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A CRITICAL EVALUATION OF THE MANAGEMENT OF CHANGE IN AN INTER-CULTURAL PROJECT

**A project submitted to Middlesex University in partial fulfilment of the
requirements for the degree of Doctorate of Professional Studies**

by

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A CRITICAL EVALUATION OF THE MANAGEMENT OF CHANGE IN AN INTER-CULTURAL PROJECT

SUMMARY

The purpose of this study is to critically evaluate the author's management of the EU funded Project SMART: "Strategic Measures to Achieve Reform Targets" as a Case Study. The purpose of SMART was to train Polish participants to develop eight subject syllabuses and examination papers and also a system to administer the new Polish A Level examination system.

The study looks at the cultural, political, communication and social aspects of managing change in an inter-cultural context.

The author had to manage, develop, maintain and implement novel solutions to complex problems and situations. These were fiscal, inter-personal as well as technical. In order to achieve successful outcomes and fully meet the objectives of the programme, it was necessary to understand the dynamics of working in an inter-cultural context.

The hypothesis examined is that project managers in a multi-cultural context are more likely to be successful in implementing change if they recognise that the context in which the change is taking place is problematic and multi-dimensional and needs to be taken into account systematically by planned strategies. This is achieved by addressing the personal, social and work issues as opportunities to set clear objectives; to use appropriate methodologies, and to demonstrate publicly the successful achievement of various goals.

In an international work based project, there is a fundamental requirement for the manager to recognise, understand and address the contextual issues of the work. This study shows that the manager is *de facto* action researcher who is learning continually about the methodologies which are best suited to continually changing conditions, imperatives and environment.

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Figure 1 **Stork's nest near the main training centre for SMART02 in Miętne.**

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GLOSSARY OF ACRONYMS

A LEVEL	<i>Advanced Level, GCE</i>
AEB	<i>The Associated Examining Board</i>
CEFTA	<i>Central European Free Trade Agreement</i>
CITO	<i>Dutch National Examinations Centre, Arnhem</i>
CODN	<i>Centralnego Ośrodka Doskonalenia Nauczycieli w Warszawie (Central In-Service Teacher Training Centre, Warsaw, Poland)</i>
EU	<i>European Union</i>
FAIM	<i>Family of Applications for Information Management (software developed by Hamlet Computer Group Ltd)</i>
GCE	<i>General Certificate of Education</i>
GCSE	<i>General Certificate of Secondary Education</i>
GNVQ	<i>General National Vocational Qualifications</i>
INCE	<i>Instituto Nacional de Calidad y Evaluación (National Institute for Quality and Evaluation, Madrid, Spain)</i>
IT	<i>Information Technology</i>
MEN	<i>Ministry of National Education, Warsaw, Poland</i>
MPU	<i>Monitoring of Performance Unit</i>
NATO	<i>North Atlantic Treaty Organisation</i>
NVQ	<i>National Vocational Qualifications</i>
OECD	<i>Organisation for Economic Cooperation and Development</i>
PHARE	<i>Poland and Hungary Assistance in Restoring Economies (an EU-sponsored programme for Eastern Europe)</i>
PMU	<i>Project Management Unit</i>
QCA	<i>Qualifications and Curriculum Authority</i>
SCRE	<i>Scottish Council for Research in Education</i>
SMART	<i>Strategic Measures to Achieve Reform Targets</i>
TERM	<i>Training for Educational Reform Management</i>
TFL	<i>Task Force Leader</i>
UNIDO	<i>United National Industrial Development Organisation</i>
WOM	<i>Wojewodzki Ośrodek Metodyczny (In-Service Teacher Training Centre in Polish Local Authorities)</i>

A CRITICAL EVALUATION OF THE MANAGEMENT OF CHANGE IN AN INTER-CULTURAL PROJECT

INTRODUCTION

Overview of the Study

The purpose of this study is to use the EU funded Project SMART: “Strategic Measures to Achieve Reform Targets” which was launched on 12 May 1997 and ran for 27 months as a Case Study for the evaluation of the management of an intercultural change programme.

The Terms of Reference of the SMART Project:

- to provide an administrative system and regulations for pilot examinations in 8 major local authorities (*Kuratoria*)¹ in summer 1998 for approximately 1,600 candidates, taking 8 subjects in the Nowa Matura;
- to develop the necessary skills and knowledge of the administrative staff in each Kuratoria and the Subject Groups to enable them to undertake all the tasks required to run the pilot examinations;
- to develop the appropriate forms of assessment, support material and regulations for use in the pilot examinations;
- to prepare training materials for use in cascade training of teachers within each of the Kuratoria;
- to develop a Polish national system for monitoring standards of achievement in literacy and numeracy at 14+ and 18+;
- to develop trained personnel, and hardware and software capability for examination processing for the 8 regional examining centres.

The purpose of the Dprof Project is to understand, document, analyse and rationalise the use and effectiveness of management systems employed in a context which is inter-cultural, multi-layered, multi-purpose and evolving. I shall be

¹ Gdańsk, Katowice, Kraków, Łódź, Łomża, Poznań, Warsaw, Wrocław.

looking at the cultural, political, linguistic, managerial and technical aspects of managing change and developing reform systems in an international context.

Within the Component of the SMART Project I collaborated with twelve of the Polish working groups for which I had responsibility. These were:

Administrative (Local Authority) Group, 8 Subject Groups, the National Monitoring of Performance (Key Skills) Group, the Evaluation Group and the Executive Group. Each of the above Groups had a designated leader who was to be the main point of contact.

Additionally, I led a team of consultants from England (The Associated Examining Board), from The Netherlands - CITO - (the Dutch National Assessment and Research Centre) and Scottish (SCRE - Scottish Council for Research in Education).

Because of the uniqueness of the work, I had to develop, maintain and implement novel solutions to complex problems and situations. These have been fiscal, inter-personal as well as technical. In order to achieve successful outcomes and fully meet the objectives of the programme, it has been necessary for me to achieve an understanding of Polish culture. To this end I spent four years learning the Polish language in order to inter-relate and understand the country and its people better. My role as EU Task Force Leader has often placed me in delicate situations where high levels of discretion and confidentiality were needed together with sensitivity to others' needs and the requirement to work with teams to resolve sensitive problems and resolve conflicts of interest, often in a politically delicate environment.

Hypotheses

The hypothesis examined is that project managers in a multi-cultural context are more likely to be successful in implementing change if they recognise that the context in which the change is taking place is problematic and multi-dimensional and needs to be taken into account systematically by planned strategies. This is achieved by addressing the personal, social and work issues as opportunities to set

clear objectives; to use appropriate methodologies, and to demonstrate publicly the successful achievement of various goals².

Objectives

The objectives of this study are:

1. To describe the context of the Case Study (see 6 below): the background of Polish education, its communist antecedents before Solidarity; the current reform of education and national assessment; the status of teachers; assessment reform, its purpose; political interests and imperatives.
2. To understand how national culture affects a variety of issues and constructs and how to use this understanding positively to avoid obvious and subtle cultural clashes and therefore take account of this in developing management strategy and project methods.
3. To demonstrate that change is problematic and meanings are negotiable.
4. To identify factors affecting the effectiveness of change in the inter-cultural context.
5. To critically review methods of managing change. To recognise the need to adjust to different and changing circumstances and use a flexible approach to the meta-management system (thinking about “systems”) using unstructured and structured ways of managing. To demonstrate the use of intuition, hard and soft management systems in different situations;

² These goals were of several types, including personal and social, e.g. developing professional status as well as making firm friendships.

6. To use the SMART³ Project as a case study using a multi-dimensional approach looking at factors influencing the actors. To show how Action Research methodology was used.
7. To explain strategies adopted, methods, results, revised strategies, lessons learnt and applied in new contexts⁴ and feedback from a variety of sources.
8. To propose a systematic solution to similar project management situations.

Work Based Learning Methodologies

In an international work based project, there is a fundamental requirement for the manager to recognise, understand and address the contextual issues of the work. I will argue that the manager is *de facto* action researcher who is learning continually about the methodologies which are best suited to an often changing environment or at least one which he perceives to be changing as more of the cultural context is revealed to him.

³ "Strategic Measures to Achieve Reform Targets": May 1997 - August 1999. A Programme comprising four components to develop an educational reform programme in policy development for teacher training, curriculum development and national assessment. I was the EU project manager and director of SMART Component 02 responsible for directing a 27 month programme of training and development to establish the capability of conducting national assessment of the curriculum. It is this project which will be the Case Study dealt with herein.

⁴ In inspecting the World Bank Project in Moldova I was able to critically evaluate the training and advise on improvements to be made in the light of my experience with SMART.

CHAPTER ONE

The Context in which the Management of Change is taking place

1.1 Poland Today

The Case Study which is at the centre of this thesis concerns recent reforms to the education and particularly the assessment system in Poland. By way of introduction to this chapter, I describe the present state of this fascinating country which has so greatly suffered over hundreds of years from being the watershed between Eastern and Western Europe.

At the end of 1997 Poland ranked 8th in Europe by size of population with a total of almost 40 million people, 51% of which are women. Over 98% of the population are ethnic Poles. Over 62% live in towns. Poland's workforce is one of the youngest in Europe with about 60% under the age of 40 in 1996. The vast majority (90%) of Poles are Roman Catholics. Polish is the official language, but in general educated Poles learn to speak one or more additional languages.



Figure 2. Countryside near Miętne, Garwolin, one hour's drive south of Warsaw showing the horse and cart are still in common use.

Poland is a member of the United Nations Organisation, UNIDO⁵, the International Monetary Fund, the World Bank, OECD, the Convention for the Protection of Intellectual Rights and other international bodies. It is also an associate member of the European Union and a member of the free trade zone CEFTA comprising Poland, Hungary, the Czech Republic, Slovakia, Slovenia and Romania. The main goals of Polish foreign policy are:

- Political and economic integration with the European Union
- Membership of NATO – achieved in March 1999
- Cultivation of close economic and political relationships with neighbouring countries.

1.2 The Polish Educational Reform Programme

*"It is school education and higher education that will determine the position of Poland among other states. Today education shapes the identity of the nation and the development of its culture as the country opens out to the world. Education is also the best way to ensure equal chances in life"*⁶

The importance of a radical reform of the Polish educational system was universally acknowledged over the last five years both within and outside Poland. Progress was slow, up until the last elections in 1997 which put into place a reforming government which was determined to make its mark by the end of its term of office (2002) through a range of major social and fiscal and economic reforms. The driving force for these reforms is the potential benefits of joining NATO and, more importantly, the European Union.

The Polish educational system has been criticised for the following shortcomings:

- the high value placed on acquiring knowledge and facts at the expense of skills;
- teaching academic subjects in compartments;

⁵ United Nations Industrial Development Organisation.

⁶ Quotation from speech of the Prime Minister, Jerzy Buzek, at the session of the Sejm of the Republic of Poland on the 11th of November 1997.

- the low status of the school and the lack of partnership between school and home;
- the very specialised and long vocational training;
- the tendency to favour teaching programmes designed for groups rather than individual education;
- low financial and social status of teachers.



Figure 3 Vocational schools specialise in a specific work area. This school for hotel and catering is displaying its specialism on a stand at the annual educational fair in the Hala in Wrocław. Other specialist schools offer courses for telecommunications, military studies, ceramics, forestry, etc.

Ten years after the overthrow of Communism in 1989, Polish politicians declared that a number of factors meant that conditions were particularly suitable for the introduction of comprehensive educational reform. These included the following factors (MEN, 1998):

- the increasing need to cope with the challenges related to the integration of Poland with the European Union;
- the necessity to introduce changes resulting from the reform of the national and local system of administration;

- the serious demographic decline in the population of 6 to 7 year olds which will reach its lowest point in 2001-2002.

The comprehensive reform planned for 1999 - 2002 was intended to cover the following areas (MEN, 1998 p.2):

- *“the structure of the education system ranging from the nursery school to doctorate studies, including the introduction of a new school system;*
- *changes in the methods of administration and supervision of education to adjust them to the new State system;*
- *a curriculum reform comprising the introduction of the curriculum framework as well as changes in the organisation and methods of teaching;*
- *the establishment of a system as well as procedures for assessment and examination independent of the school*
- *the determination of the economic status, sources and methods of financing the school;*
- *the identification of qualification requirements for teachers which would also be linked with promotion paths and the system of remuneration at an adequately high level.”*

1.3 Status of education and teaching force.

Education has been highly prized in Poland for centuries. Under foreign occupation, however education was the privilege of the elite. After 1919, in an independent Poland a central system was brought in. Still now, Polish children regularly triumph in international skills competitions, such as Mathematical Olympiad. The elite schools (Lycees) in Poland produce highly able young people who attend such

ancient seats of learning as the Jagiellonian University in Krakow (the second university to be established in Continental Europe) founded in 1364.

However, the quality of a lot of teaching is questionable, rote learning is the norm and many university teachers are not highly regarded by their students.⁷

The Communists in 1947 introduced a Soviet style educational system, that is universal provision for all, and had to train a large number of relatively under-qualified teachers as an emergency to meet increased demand. Even today (1996 figures) only 61% of Primary level teachers, teaching pupils aged 7 - 15 years, have completed higher education - and 30% of these had only 2 years teaching training, with 9% completing just secondary school (Euridice, 1997). The Communist state provided a contract of 18 hours maximum contact teaching time, no extra duties and a relatively modest wage. Under communism the wage was relatively acceptable as there was little variation between salaries of government employees in all sectors. Also there was a flat management structure with the school principal as the only member of staff with additional responsibilities and slightly higher salary.

There were two consequences of this system. When the national system collapsed under Solidarity, and inflation crippled the economy, teachers suffered the worst of all sectors in the public domain. Very few men could afford to raise a family on their teaching salary. The majority of the workforce is female⁸ and even then usually they supplement their income with extra hours of private tuition or other work⁹. Therefore there is a reluctance to take on additional responsibility (not only extra mural) in school without extra pay to recompense for the loss of earning outside. Additionally, with no tradition of in-school staff development¹⁰ in managerial skills - there being little experience of internal staff development through departmental or

⁷ I did not conduct a systematic survey but in over 5 years of working in Poland I frequently came across these opinions from former and current university students. Students would for example often find classes cancelled at the last minute, or an ill-prepared junior teacher substituting for the regular tutor, particularly galling when the students had travelled for hours to attend classes. (private communications).

⁸ Most recent published statistics show that 82% of the teaching force are female, the figure for secondary schools is 68%. In the SMART programme it was 61%. (CODN, 1995)

⁹ But only in large cities in examination subjects.

¹⁰ There is very good external provision, considerably better than in the UK for in-service teaching training. This is undertaken by In-service teacher training colleges, in each Local Authority. Serving teachers work part-time as advisers in curriculum development, research, assessment matters. The WOMs (Wojewodzki Ośrodek Metodyczny) were mainly responsible for providing the Polish experts who took part in the reform programmes (eg TERM, Nowa Matura and SMART programmes).

faculty structures - there were and still are immense barriers to implementing reform programmes.



Figure 4 The History Group of SMART02 attend a History lesson at Alton Sixth Form College, Hampshire.

This now is eased somewhat with externally funded (EU) reform programmes such as TERM (1994-1996) and SMART (1997-1999) where teachers directly involved on reform projects were officially contracted to the project and the school given supply costs and the individual paid a small but useful emolument and travelling expenses for working (including a number of weekends) for the Project for an average of 2-4 days per month.¹¹ Of course the selected teachers were exceptional in other ways as will be seen later. However, the real problem in implementation is convincing the front-line “ordinary” classroom teacher that the changes are not going to increase their workload at the expense of their “outside” earning potential, that their additional training requirements will similarly not jeopardise their other earnings.

¹¹ In a similar project in Moldova, teachers were paid nothing for their work on the project, not even travelling expenses, although finance was available from the external funding body. The reason for this was that the teaching force as a whole had not been paid regular salaries for months. It was seen to be unjust to use the external funds to pay for the work undertaken by a 'privileged few' while the main teaching force remained unpaid. This caused considerable problems for the sponsoring body who were obliged to ensure that the funds were spent or otherwise lost to the project. Even after two days of intensive meetings with the Ministers of Education and Finance, this problem was not resolved.

1.4 The old Polish education system

The old system consisted of a common eight-year elementary cycle which is compulsory for all children, starting at the age of seven. After this, pupils continue their education either in a lyceum, or a technical school or a basic vocational school. The lyceum provides a broad, academic education, lasting four years and is a preparation for higher education. The technical schools provide four or five years of combined vocational and academic studies, leading to certification as a technician or entry to higher education. The basic vocational schools provide a three-year vocational course leading to direct employment in a specific occupation.

1.5 The New Polish education system (from 1999)

The major changes introduced in 1999 to the education system were firstly, to provide six years of schooling at Primary level (ages 7-13), three years at Gymnasium, and three years in upper secondary (ages 17-19). The second reform was to introduce national assessment at the end of Primary and a completely reformed Matura examination, equivalent to the UK Advanced Level GCE, conducted according to national standards and procedures for 19 year olds in general education (excluding vocational schools).

Figure 2 below shows the new system in diagrammatic form. (MEN 1998).

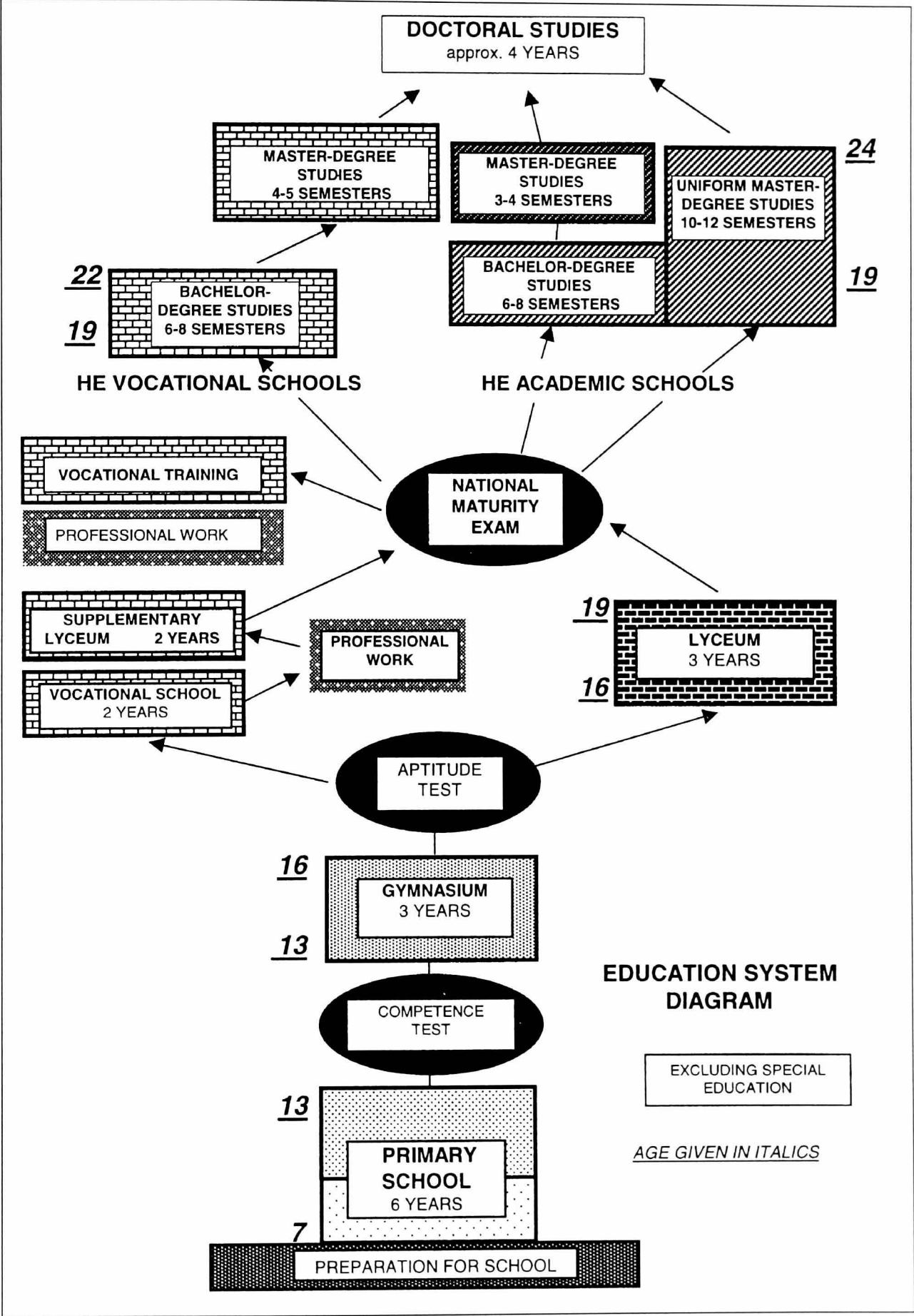


Figure 5 The new system of Education which was introduced in September 1999

1.6 The Importance to the Polish Matura examination

I will describe the general situation regarding the Matura as it existed up to the implementation of the reform programme in 1999. The Matura goes back over 175 years in Polish Culture. There are even popular songs about it.¹² Every Polish person knows about it.

The Matura examination may be taken by all those who complete the general high senior secondary school and is also an option for technical school graduates. It is necessary to pass the Matura in order to apply for higher education¹³, but the examination itself is rarely used for selection purposes by tertiary institutions. Instead, most departments in these institutions - set their own selection examinations, commonly based on a completely different 'syllabus' from that for the Matura.¹⁴



Figure 6 Polish Mother Tongue Group in Farnham Sixth Form College

¹² *Matura*. by Czerwone Gitary is the most well-known.

¹³ Indeed it is a rite of passage. One person known to the author left school without taking Matura and was so ashamed that he was unable to admit this to his future parents-in-law. However, as a mature student he crammed at night school and at the age of 23 took his Matura and became accepted into Polish society.

¹⁴ When a group of some 30 - 40 teachers were asked what they thought was the purpose of the Matura, almost one third identified the main purpose as that of 'Motivating the students to work hard'. Perhaps most interesting is that an equal number decided that the purpose of the Matura was that of 'Qualifying for entry to the intelligentsia'. (Lowe, 1997).

The Matura is a national examination only in a very limited sense. Its overall format is fixed by national regulations but papers are set by the forty nine individual Kuratoria (Reforms of local government in 1999 reduced these to 16). It is common for Kuratoria to publish in advance a long list of possible topics on which questions may be set, but the form of the examination is such that only a very small number of these will actually appear on the paper. The Polish Language (includes Polish culture) written paper, for example, which is the only paper that is compulsory for all students, comprises three to five essay titles from which the students must answer just one. For this they are allowed five hours.

Papers in other subjects similarly demand answers to only a small number of questions: three from a choice of five in Mathematics and Biology, for example, also with a time allowance of five hours. The actual question setting is commonly carried out by a teacher chosen by the kuratorium, although in some Kuratoria this may be giving way to the use of a small committee, perhaps including university representatives. A student will usually sit just two written papers but will also take three or four oral examinations. The Matura, therefore, examines an individual student in just four subjects, although he or she will have studied perhaps ten or more during the four years of secondary schooling.

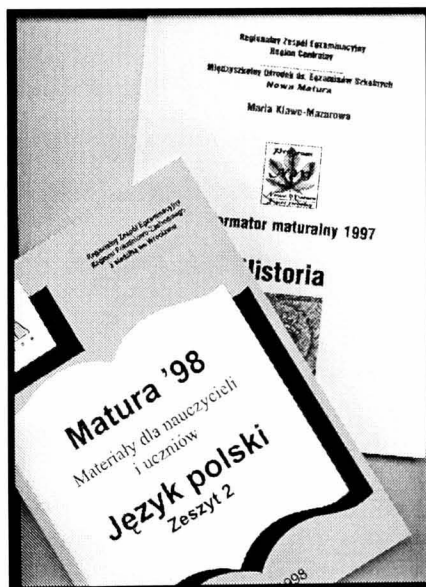


Figure 7 Each region produced handbooks for all Matura subjects

Although set at kuratorium level, written Matura papers are marked by the students' own teachers, who give grades on a 1 to 6 (highest) scale. No marking scheme was

provided, only brief descriptions of performance criteria for each of the 6 levels are used, these are published in the relevant Ministry of Education regulation, under the headings 'excellent', 'very good', 'good', 'satisfactory', 'mediocre' and 'inadequate', but these are given in very general, non-subject-specific terms that teachers must interpret for themselves. Teachers may, indeed, ignore these descriptions entirely since there is little serious checking or moderation of marks. Strictly speaking, each individual grade given by a teacher should be justified in writing and it is the responsibility of the Principal of each school to confirm these grades, but this is commonly a formality, particularly for subjects of which the Principal has little knowledge.

Lowe (1997) remarks that:

“Not surprisingly in these circumstances the ‘pass’ rate for the Matura is very high, probably greater than 90 or even 95 per cent according to teachers who were asked about this, although it has proved difficult to obtain a precise average figure. There is considerable incentive for teachers to mark their own students generously, since both their and their schools’ reputations would be harmed by high failure rates (Marquand 1993). A ‘pass’ in this situation means attaining a level that gives the student the right to apply for university admission, but this level is in fact only the second lowest of the six grades.

There was no comparability of standards, or even among schools within the same kuratorium or between the Kuratoria.

“In conversation, teachers admit that they are influenced by their knowledge of their students when grading the written papers.”

To fail the Matura is almost to lose the right to membership of mainstream culture.

1.7 The Marquand Report (1993)

Professor Judith Marquand of the University of Sheffield, prepared a Report for the Ministry of Education which discussed a wide range of possible roles for public assessment in Poland, and the options for the administration of the Matura examination; and other national assessments. The Report encouraged local school and Kuratoria based developments and some innovative and very competent development work began to emerge in some Kuratoria.¹⁵

¹⁵ Notably Wrocław in Physics and Kraków in Mathematics, and other Kuratoria and WOMs (In Service teacher Training Colleges) - source author's own observations.

Many of the weaknesses in the current Matura identified by Marquand are predictable from the above description of its form and administration. As one Polish critic commented:

The faults of the current Matura are:

- *the absence of comparability across schools and Kuratoria;*
- *the pressures on teachers to mark their own students generously;*
- *the narrowness of the examination in terms of both the number of subjects assessed for any individual student and the sampling within each subject;*
- *the emphasis on the reproduction of knowledge rather than higher order skills*¹⁶ (Hiszpanska, 1995).

The need to achieve comparability in the Matura across the country was emphasised in the report. Comparability was considered to be particularly important in view of the new roles envisaged for the Matura and future assessment instruments that might be introduced. For the Matura, these would include the use of results for selection into higher education institutions and as certification for use by employers.

The establishment of a structure for a national assessment system was discussed largely in the context of running (and reforming) the Matura examination.

Further recommendations included a co-ordinating Council (similar to the English QCA¹⁷) to the Ministry of Education, and a Research Unit to ensure comparability across the country and to inform future developments.

1.8 Nowa Matura - The New Maturity Examination¹⁸

In the wake of the Marquand Report, the Ministry of Education established the Nowa Matura programme, funded internally and the TERM Project¹⁹, (funded by

¹⁶ The examination reflects a characteristic of Polish secondary education in general (Janowski, 1992).

¹⁷ QCA is the UK Qualifications and Curriculum Authority responsible to the Government for standards of all national qualifications with the National Framework, for example, GCSE, GCE, GNVQ, NVQ.

¹⁸ I am very much indebted to my colleague, and fellow consultant on the TERM Project, Dr John Lowe for his research undertaken during the early years of the reform programme. Quotations are taken from his unpublished paper, Lowe (1997).

¹⁹ TERM - Training for Education Reform Management, (1994-5).

the EU). The programme was seen as the first step in the formation of a national assessment system along the lines recommended by Marquand, and teachers of selected subjects and kuratorium representatives of the biggest Kuratoria²⁰ began work from September 1994.

The Nowa Matura/TERM²¹ programme focused on exploring what was happening in other European countries. The Terms of Reference for the Nowa Matura indicated Poland's desire for much greater integration with Western Europe²² as soon as possible, and the concern with comparability of educational standards can be seen as part of this process of re-integration.

Teachers and others in the Nowa Matura programme, were given, in translation, syllabuses and examination papers from England, France and Holland, together with explanations of how public examination boards were structured and operated in these countries. They were initially enthusiastic and wished to introduce these examination papers as they stood, together with the associated administrative arrangements, directly into Polish practice. Lowe (1997) writes:

"It was clear that this exposure opened up visions of assessment possibilities that were excitingly different to anything they had known before. However, sometime later at least some of the participants showed a reaction against these 'alien forms' and began to defend the Polish system as being fundamentally sound and of high quality. This did lead to a more critical appraisal of the novelties they were meeting. Some of it may have been a form of defence against a perceived threat to a key aspect of their own identity as members of the intelligentsia. There was probably also an element of frustration at finding that other European countries had not found a 'Holy Grail' of educational assessment and were indeed involved in some deep soul-searching over their own practices."

Indeed, there seems to be a 10 year cycle of change in educational systems within Europe. Centralisation gives way to decentralisation and turns back to centralisation, formal external assessment to informal teacher-based assessment

²⁰ Gdańsk, Katowice, Kraków, Łódź, Łomża, Poznań, Warsaw, Wrocław.

²¹ For ease of communication I will call this Project "Nowa Matura."

²² Poland has applied for membership of the European Union for entry in 2001 – but this may be delayed.

and returns to formal assessment regimes, local political control moves to national political control and returns to local authority. I appreciate the summary given by Eckstein and Noah (1993) who examined cross cultural approaches to educational assessment and said on these issues:

'If examinations provoke debate and conflict, it is because they are not merely technical devices to evaluate students. The policies and practices they embody carry ideological and political freight. Educational, ideological and political issues become intertwined, especially over questions of control, who shall control the examinations, and what shall the examinations control?

Neither of these questions finds permanent solutions in any country. Instead, current examination policies and arrangements are best regarded as the outcome of a series of compromises and among competing values, interests, and points of view, or ... as a set of trade-offs between competing values."

1.9. The context of the reform programme set against the culture of Poland.

"The equipment and skills of the blacksmith are useless in a world dominated by the microprocessor" (Kulerski, 1998)

It appears that generally in the West, the development of national education systems do not keep pace with mainstream structural changes in society. Until the 1950s, national economic, political and social structures developed gradually and the different elements of national culture, kept pace with each other. Observers of the Polish situation claim that in Poland, the rate of change has accelerated and educational development has fallen behind. Kulerski, argues that today, the younger generation face changes in their social environment that are completely different to those their parents had faced. This in turn requires a more responsive and realistic approach to education. The current generation of young people need to be able to develop new skills, understanding and abilities including flexibility and the ability to adapt and to ever-changing and sometimes unforeseen changes.

The requirement for a different system of education in Poland

"also requires creativity and partnership among many different people. ... Additionally, we need a new form of educator. People who are actually partners in seeking together with students new knowledge and new futures."
(Kulerski, ibid.)

Education has suffered from the inheritance of a communist legacy while this is still affecting attitudes, styles and forms of teaching, change will be resisted and structural reform will be difficult. As Kulerski puts it:

"In Poland, for half of this century, the authoritarian centres of teacher education were under the political pressure of the Communist Party. They were in isolation from the influences of democratic countries and they were specifically designed for the needs of the communist system. Teachers developed a practice and methodology to fit the system. Since they were not exposed to other models of education; teachers, ... did not even know they were helping to propagate the policies of the Communist Party."



Figure 8 Philip Williamson, AEB consultant (front row left) with Aldona Hildebrand, Head of the Central Examining Commission's Department for Research and Evaluation (second left) with her group during a lunch break on their Study Visit to Guildford.

There is further evidence of these problems. In the publication Observations about Teacher Education, (quoted in Kulerski), Grzegorz Pyszczyk wrote:

"... the aspirations of the Colleges of Education were shaped by their historical development. They were created in the second half of the 1940's as a higher form of teacher education that was developed to bypass the barriers of teacher education in universities and provide schools very quickly with teachers. ... It is clear that the government of the time wanted to have a sufficient number of politically correct teachers who had not been educated in the 'bourgeoisie' universities."

Kulerski claims that there is special significance in that in the pamphlet, (I referred to at the beginning of this Chapter): *The Reform of the Education System: Introductory Concepts* published by the Ministry of Education (1998), and in a paper: *The Conceptual Analysis of the Structural Reform of* were omitted. He later asked a Vice-Minister, who was not from the education sector, why important papers, for example, prepared by the OECD²³ were kept secret²⁴ he answered that "*this is common practice in a lot of Ministries. Papers, documents, or reports which are uncomfortable for various reasons are kept in files and not made public.*"

Kulerski a Vice Minister in the Ministry of Education (1990-1991) wonders why the work of the OECD would be seen as troublesome and speculates that: first, "*as in the case of a sick person diagnosed by a specialist with a serious illness it is sometimes easiest to ignore it*"²⁵. And, secondly, there is a political imperative to keep such reports secret. The diagnosis of the need for radical changes in the system of teacher education would be perceived as questioning the qualification of teachers, and would be seen as a political threat.

This is a problem which we had to deal with. We tried to select those teachers who could cope with learning the new style and ways, could accept change and would be the champions of reform with their own institutions. It was important for me to understand this in order to plan and organise the training experiences and style of delivery within SMART Project. The implications when we came to the cascade or dissemination phase towards the end of the programme were very considerable, as the "creme de la creme", teachers were missionaries returning to hostile lands with their message.

The Ministry of National Education (MEN) was very aware of this and the need to inform all stakeholders of the national educational reforms. Senior staff and politicians in the Ministry were acutely sensitive to public opinion. Those politicians and Civil servants who "got the message wrong" were quickly disciplined, moved or sacked. This was embarrassing as we had arranged for training in the UK, introduced them to QCA and other high profile agencies and then they relinquished responsibility for the project.

²³ OECD, (1996). The Review of the National Policy of Education in Poland.

²⁴ This Report was **not** even translated into Polish!

The MEN used the press, TV especially, popular magazines, educational journals (*Perspektywy*) and videoed a series of nation-wide debates. They supported the publication of information booklets to keep the regions and nation informed. However, teachers who were not close to the reforms had many fears, as did those in SMART (see discussion on Motivation in Chapter Four). The principal fear was of more work for the same very low reward. It was widely recognised that the many plans and aspirations for educational reform in Poland will depend, to a large degree, for their success on the quality and morale of the teachers and on the change of teacher's attitudes²⁶.

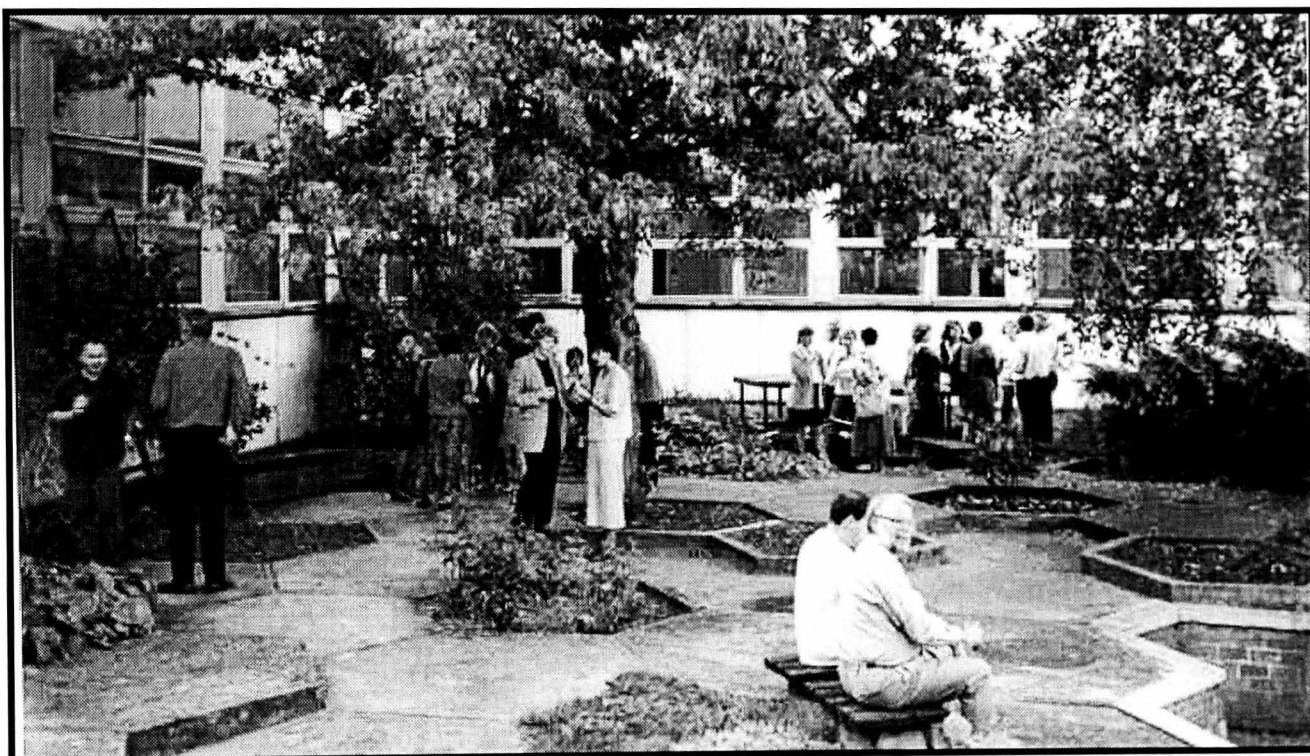


Figure 9 SMART02 participants and EU consultants taking a break in the courtyard gardens at the training centre in Miętne.

1.10. The Work of the Change Agent

The critical issues relevant to the work of the professional change agent operating in the context of education and assessment reform described above, are to:

- understand the historical and political context (often complex) in which change is taking place;

²⁵

This is quite a common experience in Poland and is documented by Ronowicz (1995).

²⁶

But, as one Polish colleague said, "...but chiefly on PAY!!"

- realise that there are different perspectives of the same situation dependent upon the antecedents, position and status of people in the different sectors within education;
- contextualise the change programme within the culture of the country;
- recognise that amongst the stakeholders, different agendas are operating.

The next chapter argues that one must recognise that managing change programmes within an unfamiliar culture is problematic. The cultural differences, many of them subtle and complex, between EU and Polish participants need to be acknowledged and dealt with. Of all the factors involved, the style of communication emerges as one of the most significant.

CHAPTER TWO

Managing educational change in another culture

Anglik, Francuz i Rosjanin ogladają obraz przedstawiający Adama i Ewę swawolących w Ogrodzie Edenu. „Spójrzcie na ich chłód i opanowanie” powiedział Anglik. „Oni muszą być Anglikami”. „Nonsens” sprzeciwił się Francuz „Oni są nadzy i tacy piękni To oczywiste, że to Francuzi. „Nie mają ubrań, nie mają schronienia” odparł na to Rosjanin,, Maja tylko jedno jabłko do jedzenia i mówi im się, że to raj. To na pewno Rosjanie”²⁷.

2.1 Managing the Change Process in an Inter-cultural environment

Even within a single culture, change is problematic and meanings are negotiable. Perceptions of the same phenomenon differ according to the customs, habits and context of the actors. When the change agent is managing a project which includes participants from other cultures (and is operating in a culture which is different), the effects are compounded. I hope the tale above helps to illustrate this. I want to show how various factors were identified and the features addressed which will be further explained in Chapter Four when I examine the SMART Project Case Study.

Arguably, the change agent who is *at least aware* that there may be differences is at an advantage over one who takes for granted there are none. The change agent who seeks to understand what these differences are, and how to deal with them; or acknowledge that these cultural differences might account for problems in the management of the change process; should be better prepared to resolve difficulties: by being more sensitised to the issues.

In relation to the SMART project, were there any differences between Poles and foreigners? There is a rich literature on this topic. Poles have been active emigrants. Also in the last 10 years there has been vigorous investment into Poland from the West and the establishment of foreign managed companies

²⁷ A Briton, a Frenchman and a Russian are viewing a painting of Adam and Eve frolicking in the Garden of Eden. "Look at their reserve, their calm," muses the Brit. "They must be British." "Nonsense," the Frenchman disagrees. "They're naked, and so beautiful. Clearly, they are French." "No clothes, no shelter," the Russian points out, "they have only an apple to eat, and they're being told this is paradise. They are Russian."

employing local employees. Total inward investment into Poland 1997 was \$US 6.6 billion of which \$US 1.6 billion was from the UK²⁸.

2.2 Relationships between Poles and foreigners

Interest in and concern about cultural differences between Poles and foreigners and the effects of such differences within an organisation is a relatively new phenomenon. In the late 1980s systematic “cross-cultural” studies and research programmes were undertaken in a number of multinational companies operating in Poland (see Adler (1991), Elashmawi and Harris (1993), Harris and Moran (1993)).

Hofstede (1980), identified four basic dimensions of cultural differentiation displayed by employees during the course of his research conducted among IBM employees in over 40 countries. These are summarised below.

	Attribute	← Behavioural extremes →	
1	Power distance relationships	Total Acceptance	Clear irritation
2	Avoiding Insecurity	Takes risks and is creative	Follows rules
3	Style of working	Individual	Collective
4	Gender issues sensitivity	Open to debate	Closed and hostile to discussion

Table 1 Hofstede’s Basic dimensions of cultural differentiation

The task of the management is to recognise where employees tend to be located on these continua and take these cultural preferences into account in dealing with conflict and labour relations, particularly in setting goals, competitiveness and co-operation, creating work groups and leadership development. These were all issues relevant to my management of the change programme within SMART.

²⁸ The largest investors from the UK are Glaxo Wellcome, BOC, Kodak, Rank Xerox, United Biscuits and Tesco.

Korporowicz (1996) argues that it is not enough to acquire new technologies and efficient systems of control. Personnel faced with new tasks require something more – an effective leadership which will not only choose, but also present, in an understandable way the company's new vision and tasks. The leader will also tap in to motivations of the workforce, their system of values and aspirations, and potential for achievement. One of the basic features of effective leadership is recognising specific needs of a particular group of people in the structure of the whole company and then co-ordinating them with the needs of other groups. (Simons, et al, 1993).

Such situations take place in circumstances when there are significant cultural differences among the groups, often transcending strictly professional division of tasks and competencies. Not without reason such trans-cultural type of leadership becomes more and more necessary in multinational companies. Its basic aim is to reduce both the cultural stress of the co-operating groups and also communication dysfunction. It is intended therefore, to develop so called "intercultural competence" of the team members and to create situations in which cultural differentiation becomes not so much the sole reason of failures, but more a kind of creative potential (Harris, 1989). The power of the leader cannot be underestimated. Francis (1976) found that the single most influential factor on shaping the culture of a Sixth Form College was the views, attitude and leadership style of the Principal.

A transcultural model of leadership allows a recognition of the different aspirations of particular people and groups in the organisation. It accepts that there are different ways of achieving agreed goals. It enables self-expression of participants in accordance with patterns of behaviour acceptable to them, using the different creative aspects of their personalities and traditions.

2.3 The importance of communication patterns.

Differences in communication patterns used by different nationalities in a working organisation may turn out to be one of the basic reasons of the lack of effectiveness. Korporowicz, cites this as being the source of all sorts of conflicts, serious mistakes in the processes of designing and then performing common

undertakings, of “lingering and ineffective” (sic) negotiations, and of inadequate techniques of managing the human potential. The communication processes take place at different levels of social and organisational reality in the company and in all of them important cultural differences are manifested.

He categorises these as follows:

Level of Communication	
Organisational	Determines the content and way of transmission of the information both “up”, “down” or “across” its structures.
Group	It refers to the communication both between groups and within groups
Interpersonal	Determined by psycho-cultural circumstances of communication as a specific type of interaction.

Table 2 Communication patterns used by different nationalities

Korporowicz asserts that the characteristics which enable people to be capable of reducing conflicts and improving the effectiveness of co-operation are : mental flexibility, cultural sensitivity, awareness of the relativity of cultural norms, a readiness for empathy, and a capacity for being innovative. It is interesting to compare his analysis with that of Bate (1994), who says that culture is a multi-dimensional phenomena which needs a multi-dimensional process of leadership²⁹.

2.4 Barriers to effective cross-cultural communication.

In research into problems of intercultural strategies of management in Poland (Badora et al 1995) found the barriers were:

- a lack of knowledge of foreign languages among Polish workers;

²⁹ This is discussed later in Chapter Three.

- a lack of ability of the representatives of foreign investors to speak Polish;
- unfamiliarity with the Polish context, realities of organisational culture, habits and Polish law;
- over optimistic hope for improvement of their (Polish) material situation;
- fears arising out of negative national stereotypes and general reluctance to deal with strangers.

In other parts of the Report the authors add: "Those who already have experience (of working inter-culturally) much more positively assess the benefits coming from foreign investments. Those who have never had any contacts with a foreign organisation felt animosity towards it."

These findings of course impact upon the management strategies and expectations of the "foreigner" or outsider who is the principal change agent. The change agent's expectations that those involved with change will come to the project with a positive attitude towards the changes being brought about by the change agent should be challenged. (However, the author's experience has been that initially, the participants expectations are high and positive (unless they have been "damaged" by a previous similar experience - which has sometimes been the case) and that with inept leadership and poor understanding of the expressive and instrumental needs of the participants - contextualised in their own culture - everything steadily slides downhill. Goodwill is replaced by politeness which is replaced by a cooling atmosphere and thereafter a subsequent lack of co-operation is observed. This often is exacerbated by issues to do with payment of fees and working conditions³⁰. Unsuccessful leaders of multi-national expeditions can testify to this.

Change is problematic and change taking place which is managed by someone from another culture is even more problematic. Korporowicz helpfully sums up several significant points about inter-cultural management with Polish workers:

1. Employees should **not avoid** discussions, questions and situations which will help to explain and foresee cultural differences.
2. Transcultural competencies and personal attitudes of managers are valuable "instruments" of management.

³⁰ It is always gratifying to observe a well led team working to a common purpose in trying conditions with little extrinsic reward.

3. Cultural differences must not be assumed to be a barrier impossible to overcome.
4. It is important to work out a common language³¹ expressing expectations, needs and attitudes despite cultural differences.

Figure 10 One way of understanding each others culture was through the social events planned for Friday and Saturday evenings during the SMART02 workshops. One of the first events was a concert by the famous *Chudoba* folk group based in Wroclaw.
(Picture courtesy of Chudoba)

2.5 Communication and Culture

Poland is a country where everything has a historical dimension. We are living ... with the entire burden of our history on our shoulders, without being able to forget about the past or liberate ourselves from its omnipresent influence. This explains why history as a discipline is so popular in Poland."

Walicki (1990)³²

Although the political, social and economic and historical understanding of a given cultural group as well as its spiritual inheritance can be approached by reading about it, to understand the complex reality of its everyday life is much more difficult.

³¹ Indeed, at an instrumental level, there is a requirement to define terms and concepts at the outset to avoid wasteful and potentially damaging misunderstandings. My experience throughout SMART was to be very watchful about this. On more than one occasion I interrupted one of my colleagues during a presentation and checked directly with the participants what they actually understood by the use of a technical word or phrase. Sometimes certain words when translated from English to Polish had meanings which were at best confusing and at worst misleading. One such word being "centre". monitoring audience reaction by eye and listening out for the buzz of *sotto voce* discussion which signifies an "upset" during training sessions is crucial to maintaining a good working atmosphere.

³² *The Three traditions in Polish patriotism* in Gomulka, S and Polonski, A (Eds). Polish Paradoxes, Routledge, London pages 21-39.

In order to achieve this, the change agent must become familiar with a variety of different cultural aspects of life in the community. Many managers working as change agents in different cultures do not even attempt to take working in the culture as problematic. But as Checkland and Scholes (1990) emphasise, finding out about the culture in which one is working, and treating it as problematic, is crucial to successful outcomes. I have myself ignored this precept more than once and had to suffer the consequences.

One of the most serious mistakes that I made was to assume when I was working on a sabbatical exchange programme in Australia in 1995, that because the language was English, the culture was also similar to that of the UK. Very many mistakes were made in assuming that what was acceptable behaviour, linguistically, culturally, socially etc. in the UK was equally acceptable in the Australian culture. Poland has a complex social system. Its hierarchies owe more to intellectual elitism rather than to wealth. Ownership of (and more particularly), title to land (a common measure of wealth and status and nobility) has become obfuscated by invasion, shifting boundaries and loss of documentation³³. Recent history also produced confusion to the outsider regarding political allegiances. I discovered that in any one group I was working with, it was possible for there to be former communists, current communist sympathisers, those who were aggressively anti-Communist and those that were actually physically and mentally damaged under communism.

One of the biggest problems within a heterogeneous group of Poles is that the younger generation will be familiar with the democratic way of life looking to the West for ideas and models, while the older members will have spent the majority of their lives in a Soviet style culture. One of the aspects of Polish culture is the regard people have for individual's position in society. The scarcity of goods and services during the communist era gave the distributors a high status in society. However, those that were well educated and could trace their family's ancestry back to days of former glory or had high professional status even though they were extremely impoverished, were able to hold their position even in the totalitarian system in Poland.

³³ I had many discussions with Polish colleagues about the difficulty of proving the ownership of property, land and estates which had been "confiscated" or otherwise illegally taken from their antecedents by Lithuanian, Prussian, German and Russian invaders. So many of the intelligentsia and minor nobility lost everything but their lineage and genes.

Some authors, for example Ronowicz (1995) state that the totalitarian system in Poland actually strengthened elitist tendencies. He states "most Poles tend not to venture beyond what they perceive as their own social stratum". They were shy and uneasy in many situations under communism. It was certainly the case in my experience of working in Poland that the younger age group had no strong inhibitions with respect to demonstrating their independence of thought and their ability to make decisions in a mixed group whereas those educationalists who had been involved with more senior positions in the communist party only a mere 10 years previously, found the democratic culture which was the expected norm of the Western European leaders to be uncomfortable.

One of the legacies of communism was that significant promotions within an organisation or the ability to achieve promotion by changing employers occurred very infrequently for the majority of the workforce. Improving one's own working prospects through gaining more qualifications did not normally help. The most successful way of developing one's career was to join the communist party, as only those that joined could reach decision making ranks within an organisation. Even those with inferior qualifications who became active party members were able to progress more rapidly than those that had higher qualifications. This was particularly the case in the Public Service, including education. (see Chapter One for an explanation). These so called 'nomenklatura' had the exclusive right to occupy all significant managerial positions.

Much of this is still apparent in Polish education and those who are known to be 'careerists' are suspected of still having preferment because of their previous party allegiances.³⁴ At the more specific level of communication, the actual method of discourse and debate and discussion within Polish culture is very different from that in Western European circles. The way in which agreement, disagreement and opinions are expressed is much more vigorous and direct.

³⁴ This comment refers nowadays to allegiances to current political parties just as much as in former pre-Solidarity times. Still today, political connections will often triumph over personal and professional abilities. I do not think that this is unique to Poland, as I remember such situation in Wales in educational appointments in 1960 and 70s.

The Polish way of communication is to express quite extreme views with a view to simulating discussion and contradiction with other members of the group.³⁵ This often leads to a situation where each individual will express their opinion at some length without, as we would expect in the West, building on positive points made by colleagues or friends and finding a way of developing lines of argument so that a consensus is arrived at. This often gives the impression to Westerners that Poles are impolite and opinionated.

However, I observed that this kind of debate often led to a singular lack of progress in trying to introduce Polish groups to new ideas. In fact it took almost two years of working within the TERM programme to gain an understanding of how teams could be built and ideas developed. It took some time before groups felt able to share their own views without direct contradiction.

³⁵ There are many examples of the robust nature of “discussion” in Polish literature. For example in the epic 19th century poem *Pan Tadeusz*, on many occasions, discussion moves to debate to argument, followed by physical altercation and fighting, then everything calms down again.

CHAPTER THREE

Methodology of Research

3.1 Methodology

In many of my professional projects I have used a mixture of soft and hard management systems. Major projects are usually complex. They require a variety of management methods. Often these follow the Stages of the life cycle of the Project. The methods employed at the 'start-up' stage when responding to the Terms of Reference will involve 'hard systems' using classical techniques for predicting time and resource usage and its management, using instruments such as GANTT Charts, and spreadsheets for budget management and costings. As the project becomes a reality and people and ideas begin to become involved, the 'real world situation of concern'³⁶ emerges and the manager develops a number of models of the problem situation and selects from a variety of methodologies.

3.2 Hard and Soft Management Systems

Hard management systems such as solving problems in civil engineering or chemistry recognise that problems are structured. In other words they can be explicitly stated in a language that implies that a theory about this vision is available 'off the shelf'. For example answering the question of "how much force does it take to shear a beam made from an alloy of dimensions x, y and z."

Most "questions" in social science and educational research and development pose unstructured problems. These are shown most clearly when a state or a situation is felt to be wrong and needs to be improved, for example dealing with the issue of: "how we can provide a better educational system for underachieving 7-11 year old boys?" In this situation we are not talking about problems but problem situations. It is easy to recognise that there are problems but difficult to define them. Problems involving human activity systems are multi-various and the influences to which they are subject are numerous.

³⁶ See Checkland and Scholes (1990) pp 5-42 for an explication of this system.

Moreover the passage of time always modifies the problem (such that given sufficient time they would go away!).

In essence, the soft management system takes nothing for granted and uses communication and control systems to adapt to the ever changing requirements to sustain the project. The value of the soft system management approach is to take seriously the subjectivity³⁷ of behaviour. Rather than dismiss it as a wayward intervention into the ordered and predicted (hard) activities in the project, we should make this a matter for intelligent and rigorous attention. In other words treating as serious, meaningful and relevant what the hard system would regard as incidental, interfering, abnormal and non-systematic.³⁸

Somewhat unhelpfully, Flood (ibid., p77) says that "Diversity management is about managing diversity(!)". However, the main point to be taken and applied is that in situations involving change, which require human beings to take charge of the learning and development, there are no hard systems, no fool proof stratagems, all activity is problematic, leaders are challenged over - rules, authority, knowledge, ability to lead. The rules are connected, not to mathematics or physics, but to complex interactions between sub-culture, psychology, social anthropology and political and micro-economics. As Checkland (1993) says, "problems are recognised, but not defined". The task of the change agent as project leader is to expect these situations to occur as normal incidents, to recognise their problematic nature and deal with them in a non-problematic (!) manner.³⁹

3.3 Systems Application in Context

As Project Leader of SMART, Component 02, I was responsible for developing and leading the teams which would deliver the outcomes of the project (set out in Chapter Four).

³⁷ Checkland (ibid.) feels this is the crucial characteristic of human activity.

³⁸ There is a extensive body of discussion about the difference between systemic and systematic nature of management systems in Flood (1997).

³⁹ The experienced change agent expects - indeed looks forward to the unexpected.

These groups were:

1. The group of so-called “EU experts”⁴⁰, 29 EU appointed consultants ten from Holland, CITO⁴¹, six from Scotland, SCORE⁴² and 13 from the Associated Examining Board who directly reported to me.
2. The Executive Management Group comprising; myself, the EU Project Leader, with title of EU Task Force Leader (TFL)⁴³ the Project Polish Co-ordinator, Wojciech Matecki and Deputy Co-ordinator, Maria Mazur, plus three EU Experts and four Polish colleagues from four different regions⁴⁴ was responsible for directing and managing the whole of the training programme of SMART 02. This was our “set” in the terminology of Revans (1983). In fact, in the first meeting of this group in Warsaw, I very deliberately backed away from taking what was for me, and the group, the natural role as leader of this group and assisted Wojciech Matecki to develop into his role.
3. The Group of 100+ Polish participants recruited to be trained and to develop the project outcomes. With this group, the primary task was to create strong groups made up of teachers, and administrators drawn from 8 subjects and 8 regions which would work successfully together.
4. The Group of six Project Polish Evaluators, comprising three experts and three trainees, led by Prof. Helen Simons, Southampton University.
5. The IT systems development group led by two Polish experts and Peter Child from AEB.

⁴⁰ Not a term I liked but one that stuck.

⁴¹ CITO is the Dutch National Examinations Centre, Arnhem, the Netherlands.

⁴² SCORE is the Scottish Council for Research in Education.

⁴³ A term used by the Project contractors.

⁴⁴ Kraków, Łódź, Poznań, Wrocław.



Figure 11 SMART 02 Group outside the training centre in Miętne

3.4 The sources of information

The gathering of information for this thesis was undertaken throughout the SMART project. I used semi-structured interviews; discussions; some were quite informal - (chatting in the bar, walking through the forests), and others where more formal where notes were made. I collected information from contemporary sources; marketing journals, trade reports, LOT Polish Airways in-flight magazines; I went to concerts, opera, museums, cathedrals, cinema, art galleries. I met a wide range and ages of Polish people socially. I read some of the influential classical Polish literature in Translation, for example; *Pan Tadeusz*, by Adam Mieckiewicz, *Ogniem i Mieczem*⁴⁵ by Henryk Sienkiewicz. There was of course primary source material from the project, in particular the notes of meetings, the Project newspaper: SMARTGAZETA (9 Issues), which was produced every 2 months. Of particular importance were the formal written reports of the team of six Evaluators led by Professor Helen Simons (UK) and Professor Leszek Korprowicz (Poland).

⁴⁵

With Fire and Sword is also a film released in 1999 in Polish language version only.

Figure 12 John Francis EU leader and Hanna Łęczyczka, (Leader of the Polish Mother Tongue Group) exchanging notes during the Study visit to Arnhem, Holland.
(Photo. by Ilona Goryńska)

3.5 Competencies of the Change Agent in an Intercultural Context

"Culture is a multi-dimensional phenomena which needs a multi-dimensional process of leadership." (Bate, 1994)

In Chapter Two I outlined the need to address the communication issues in an intercultural setting. But there are other aspects as Bate states in the quotation above. The competent change agent, whether in the role of researcher or developer or both, should be competent in a variety of dimensions. The change agent as project manager is also a leader.

Some of the 'how-to-become' handbooks for developing management skills in leadership, often set out a set of guidelines which if followed, so it would appear, enable one to become the competent manager/change agent. Akin to painting by numbers. "Be adaptable, practical, creative, willing to learn, and a team worker" (Bartram, 1999). Of course, these are important, but what does it mean in practice? This is examined in Section 3.6.

3.6 Action Research Model.

The table below sets out the classical Action Research stages (from Gill, 1997) compared with those activities for the SMART Project

Stages	Action Research	SMART Project
Entry	Client or researcher presents problem. Mutually agreed goals	The problems were set out in the Terms of Reference by the client: the Polish Ministry of Education
Contract Agreement	Business and psychological contracting. Mutual control	The invitation to tender was bid for competitively and a formal contract was signed between the main contractors and the Ministry of Education.
Diagnosis	Joint diagnosis. Client data, researcher's concepts	There was a mutual dependence between the Ministry and the Contractors. Changes to the <i>Terms of Reference</i> had to be agreed in writing. Having won the contract, the initial response to the <i>Invitation to Tender</i> underwent significant changes and an ' <i>Inception Report</i> ' was prepared modified the initial response to the <i>Invitation To Tender</i> . This had to be 'sold' to the Ministry, and all the deviations from the original response justified
Action	Feedback. Dissonance. Joint action plan. Client action with support. Published	The actions undertaken in the <i>Inception Report</i> resulted in many changes to the work programme as a result of feedback and development work.
Evaluation	New problems emerge. Recycles. Generalisations emerge	This was undertaken systematically through a dedicated sub-component of the programme. In the first 12 months little feedback was given from the Evaluators to the Leaders. Evaluation also took place through the Executive Group meetings where progress was monitored every month. After the initial 12 months of the Project, some stability entered the system and progress was made more quickly.
Withdrawal	Client self-supporting	Client independence took place when the 8 Regional Examining and Central Commissions organising body was set up in the Spring 99.

Table 3 Stages of Action Research taken from Gill

3.7 Relationship between the SMART Project and the DProf

I was simultaneously leading the SMART Project and using it as the Case Study for the DProf Level 5 Project-work. Some participants knew that I was using the SMART Project as a Case Study from the beginning and all knew about this about half-way through the SMART Project. I was afforded quite positive assistance and support by those I approached for advice and guidance and information. Indeed, the fact that I was involved with my own personal professional development and studies alongside the participants who were also involved in innovative and creative development ⁴⁶(ie the creation of a new examination system) provided more empathetic and sympathetic conditions in which I could happily both manage the SMART Project and undertake my own research.

Indeed, my involvement in the SMART Project as a change agent and a meta action researcher as far as my DProf project was concerned raised not only my insight into the methodology of conducting the SMART Project but also the sensitivity of my colleagues to their own way of working. This was particularly so in the case of the Team Leader of the Evaluation Group who was most generous in assisting me in identifying Polish sources on inter-cultural experiences and enabled me to obtain a number of research papers which otherwise I would not have found - some of these in Polish which I had translated. In fact, I found that the more open I was about my intentions, dual rôle as change agent and action researcher, the more co-operation and good will I received, including offers to read my draft chapters.

⁴⁶ Some participants were also using the SMART Project as 'grist' for their own professional/academic development.

Figure 13 **The three leaders of SMART02, (l to r), Wojciech Małecki (Polish Co-ordinator), John Francis (EU Task Force Leader) and Steven Bakker (Leader of the Dutch consultants).** (Photo. by Ilona Goryńska)

3.8 Role of Researcher

My role within the SMART Project was that of Developer while my role within the DProf Project is that of Researcher. I adopted an open policy towards describing my DProf Project but not so overtly or obtrusively that it interfered with the SMART Project work. However, it did allow me to collect data of a wide variety. I had very many long discussions, debates and exchange of ideas with colleagues, mostly Polish participants on the Project. These were particularly on the topics of Polish Culture, Education, Language, History, Literature and Politics. Very rarely did I take verbatim notes or even outline notes at the time.

However, I did keep a daily logbook of the Project which was written up either contemporaneously in formal business meetings where this was entirely acceptable (just as a minute-taker would make notes during a business meeting).

All these opportunities gave me the chance to cross-check information, anecdotes and then play some of these back to Polish participants and others not on the Project who could then reflect back to me their views on these issues. It should be strongly emphasised that this was not an artificial or a particularly systematic

method of gathering information at primary and secondary source level, it however was focused and served a dual purpose. The first purpose being to more effectively manage the Project by understanding Polish culture better as well as providing data to be used in the DProf Project.

3.9 Project Leadership

Successful project leadership⁴⁷ requires the leader to keep the stakeholders happy, to keep the project moving forward and to focus on the end point and the achievement of the objectives. The Project Leader has to:

- work closely with the stakeholders to get their support for the project and to establish the project's value to the stakeholders.
- distribute information and communicate the value and importance of the project in order to 'sell' the project to the stakeholders.
- predict the difficulties and what needs to be put in place to deal with these. This requires getting feedback from participants in order that issues can be addressed.
- constantly evaluate, analyse, forward plan and decide what changes should be made and communicate these changes to the whole network of people involved in the project.
- identify with them where action needs to be taken, of course feeding back on success.
- focus on high quality achievements and set realistic goals.
- work with individuals to help them achieve success and identifying weaknesses which may be addressed but motivating and encouraging them.
- mark the achievement of milestones and celebrate successful accomplishments particularly the end point(s).

⁴⁷ Briner et al (1996) is useful on the role and function of the Project Leader:



Figure 14 Social activities, especially eating together, were important features of Study Visits. A Pancake House near Arnhem, Holland.

Almost overwhelming demands are made on the Project Leader by the requirements set out above. But these mechanistic functions are not enough. Without insight into the multi-dimensionality of the leadership role, the leader can flounder and founder. When we think of leaders, we can call to mind - Joan of Arc, Mahatma Ghandi, Scott of the Antarctic, Mother Teresa, Pol Pot, Lech Wałęsa, Pope John Paul II, Napoleon, Churchill, Stalin, Picasso, Oscar Wilde, Virginia Westwood and Tony Blair. How is their leadership defined or categorised? Bate (1994) identifies, in a very readable work, a variety of ways in which leadership can be and indeed is demonstrated. I have used his analyses of leadership dimensions to construct the chart below which sets out the dimensions of my leadership function⁴⁸:

⁴⁸

Very considerably condensed and modified in this table (see Bates pp 238-287).

Dimension	Leadership Role	Philosophy	Metaphorical function
Aesthetic	I was assisting in creating new meaning	Romantic	Poet
Political	I was using common sense to develop new frames of reference	Democratic	Negotiator
Ethical	I was bringing enlightenment of moral standards	Healthy Scepticism	Mentor-Educator
Action	I was developing a reality of new cultural practice	Pragmatic realism	Implementor and Champion
Formative.	I was structuring a new order in a rational framework	Rationalism	Designer

Table 4 Leadership Roles for the SMART Project

The way in which leadership is undertaken in each of these *dimensions* will affect the success of the intercultural project and influence its outcomes. But none of these dimensions operates in isolation. The leader “balances” and “blends” these. More emphasis on political gives one a power culture but more emphasis on action gives an achievement domination culture. In future studies of leadership in trans-cultural situations it would be valuable to construct self-scored and peer-scored inventories (using Likert scaling) based on Bate’s extensive discussion of these issues to explore the nature of leadership, and develop ways of improving performance.

I agree with Bate that leadership is not the province of one person but is shared. One of the strengths at the outset of SMART was that there was a shared partnership of leader with two people committed to different leadership functions in each sub-group. We also met regularly with all sub-group leaders for planning and feedback sessions.

I wanted to develop the role of joint leadership of the overall Project with my Polish co-leader. This would not happen, I felt if and while I took charge and over-dominated. I wanted his undoubted talents to emerge and assert themselves. The traditional Polish hospitality which means giving priority to me as the guest could interfere with him emerging as leader of the Executive Group. Additionally, his English Language skills were as yet not well developed and therefore there was some barrier to communication within the group, two members of which did not speak good English at all and the EU representatives had no functional Polish. I worked hard to create a supportive environment in which he could develop his leadership skills. The notion of shared leadership went much further than this. I wanted everyone within the team to exercise their leadership qualities, in the spheres where this would satisfy their personal and professional aspirations. Chapter Five deals with the issues relating to motivation. To this end we allocated responsibilities in Executive group and in Administrative groups so all could demonstrate abilities and develop their skills. Indeed it was leadership skills (and working as a team of *pares inter parus*) that were most lacking. Fortunately I recognised this at an early stage and developed strategies to deal with it.

Leadership under this definition becomes not a mechanistic technique but an art. I have met in my career, examples of people who have clearly been taught 'management by numbers'. For example, if you carry out procedures: *a, b and c* there will be a given guaranteed outcome of *x, y and z* - independently of any cultural context(!). It does not succeed, except at the expense of the human dimension, either the manager or those managed, who ultimately vote with their feet.

It is useful to note the requirement for transition from aesthetic to action leadership - put crudely: 'If you can make them fall in love with you and each other then they will work well beyond the terms of reference'. There is a certain cost to this approach. That the intensity of the 'falling-in-love' can (and in a number of cases in my project did) lead to end-of-project withdrawal problems. There was some pain because the project ended and so did some relationships. There were expectations beyond the literal objectives of the Project brief.

The emotional elements can not always be controlled. How do you represent in a dissertation or Project Report or in an academic treatise what actually happens in a

Project: the emotions generated, detailed analyses, research, negotiation, which happens day after day - with encounters, arguments, changes in direction, administrative, financial, political influences causing re-working, discussions meetings, revisions. The account given in submissions for academic awards seem to miss much of this out. It appears that real working research and development is too messy to report. The pain of not being sure what you are doing, the misunderstandings, mis-readings, the lack of sympathy from opponents, clashes between different cultures, especially those which are subtly different, none of this is found in the formal reports.

My experience, shows that real feelings, genuine opinions, evidence of human frailty, negative personal reactions are sanitised. In one of our components of SMART, the Final Report which was highly critical, was nearer the truth than most but was censored and re-written.

One needs to know what actually happened. Who was doing what and for what reason. The project failed or succeeded because of whom and what. If X had not done that (which was a bold move) not in the scheme, nothing would have happened. Because Y did that, he was sacked and we went in another direction. How much (I mean not only the achievement of the stated objectives) was achieved and how much of a lasting effect did it have on participants?

My task was to transform the existing culture of operations from a dysfunctional, rule bound, disordered one that lacked internal control and to create a functional, autonomous, self-ordering and positive environment which would be positive and flourishing. Symbolised, as it were, by moving from a "one party, centrally controlled, command economy and political order": symbolised by *The fixed Plan* into a "free market democratic western culture": symbolised by *The free People*.

A diagram adapted from Bate (1994) is helpful in setting these two contrasting situations.

CENTRALIST CULTURE	DEMOCRATIC CULTURE
---------------------------	---------------------------

Direction of desired change ➔➔➔➔➔➔➔➔

Disparate values, interests and beliefs	Shared values, interests, and beliefs
Breaking rank, going it alone	Pulling together
Regionalism and conflict	Community and co-operation
Compartmentalising problems	Seeing problems as a whole
Ruled by standards of the past	Ruled by visions of the future
Debates	Teams
Winners and losers / them and us	Confronting and transcending differences
Anti-change / reactionary	Change-orientated
Weak co-ordinating mechanisms and lateral linkages	Strong co-ordination mechanisms and lateral linkages
Inward-looking	Outward-looking
Mechanistic systems-dominated	Creative ideas-dominated
Non-reflective	Reflective
Discordant	Harmonious

Table 5 Dimensions of Transforming Culture

3.10 Ethical Considerations

While I was collecting this information and also being open about the fact that I was preparing to write the DProf Project, using SMART as a case-study, I was very sensitive to the fact that some Polish colleagues had expressed the wish to read any part or the whole of the DProf Project thesis. Therefore with this degree of openness to the thesis, there was a requirement to be most punctilious about using information both publicly available and from the SMART project itself. There is little point in being careless about facts, being cavalier about attributing sources, making unsubstantiated assertions or taking short cuts in describing, analysing and evaluating matters to do with Poland and the Project. I felt strongly, at the time when I submitted my Project Part 1 for approval, to have a Polish 'mentor' (a member of the SMART Executive Group) signed up to the Learning Agreement contract. This formal recognition that the Project thesis would be scrutinised and commented up by a native Pole raised the stakes as far as the quality of the output was concerned.



Figure 15 Wojciech Matecki - Co-ordinator of SMART and was one of a number of Polish colleagues who gave me helpful advice and support with my Dprof work.

In fact, I am more concerned with the possible unfavourable comments and reaction from Polish colleagues than I am from any other reader of the Project thesis.

This does not mean to say that I will not be critical where I believe this is valid, rather I would not wish to portray people's situations or make statements which could be criticised for being poorly researched or mis-represented.

A particular ethical problem is that the views that Poles hold about themselves and Poland and foreign consultants is highly dependent upon sub-cultural values. As an illustration of this, I read an article about the history of Poland which I later discovered was written by a vigorous pro-life supporter and that the views she held were somewhat aligned to her values and beliefs.

There was also an interesting difference in the views and values of colleagues from different age groups. Those that had experienced Soviet control for 15 to 20 years seemed to hold rather different views from those who were in their 40s and 50s. There was also quite a different view held by those that had actively worked against the Soviet regime and those that had been part of it. This is a point made quite strongly by Kulerski (1998) who makes a significant point about the attitude of teachers to education and their close involvement through the Teacher Unions in the Communist Party.

Managing the SMART programme was always my first priority rather than prosecuting the DProf Project. However, I was active in gathering information in all forms of media, recording it and annotating it.

This now, in fact, presents somewhat of a problem as some material is irrelevant, some is not useful because the original reason for gathering it has been forgotten and some material is out of date because of changes which have happened during the course of the Project. I therefore decided not to start writing the DProf Project Thesis until I had almost completed the SMART Project.

CHAPTER FOUR

The Case Study: SMART PROJECT - Reform of the National Assessment System In Poland

This Chapter begins by describing the political and educational context of the Polish examination reform programme which I co-managed. The entire educational reform programme, funded by the EU, was known as SMART. It was a complex project. I set out here the design of the programme and its objectives and describe in detail the content of the work of each of the sub-groups working together to innovate this major change experience. The SMART project was intended to follow seamlessly from the EU funded training programme known as TERM. In fact there were bureaucratic delays creating to over a 9 month gap between the two projects. TERM and SMART were designed to augment the Polish MEN funded development programme of Nowa Matura. The objectives of TERM Project (1994-1996) were to develop the initial stages of a national structure for standards and examinations and to design assessment instruments equal to the standards of quality in EU countries.

4.1 The Vision for the Nowa Matura

The SMART Project was designed to enable the nationwide implementation of the Nowa Matura. The aim of the government set out in 1996 was that in 2001 over 60% of the 18/19 year school population should be taking Basic or Advanced Matura. The government was conscious of other factors affecting the decision to move to a new Matura. More and more students were attending Secondary Schools and the number wanting to enter higher education growing. There was increasing differentiation in levels and accessibility to Institutes of Higher Education as well as a variety of ways in which students can study. There were, as was set out in Chapter One shortcomings in teacher training and educational organisations and there was a need to build institutions and train in current teaching and assessment methods.

Every graduate of Secondary School, no matter what age, should be able to fulfil the requirements to take the Matura Examinations. The new Matura should encourage all students in Secondary School to achieve a high standard of general education at either the basic or advanced level. It will provide students, parents, teachers, universities, employers, government and the general public with information about

the levels of achievement by students. It will provide an entrance qualification for university. For the implementation of the Nowa Matura, there should be:

- Continuity: a link preserved between the Nowa Matura and the previous examinations. This is important to preserve teacher and public confidence.
- Simplicity: new solutions should contain relatively small changes of significance as there needs to be training for those implementing the Nowa Matura.
- Cost Effectiveness: new solutions must not be expensive or they will be rejected, particularly by the authorities who are providing the finance for education.

The framework for the Nowa Matura⁴⁹ stated that it should comprise both external and internal assessment. The subject matter was determined by the National Curriculum introduced in September 1999. It emphasises the use of knowledge as well as the recall of knowledge and features development and assessment of skills such as analysis and evaluation. The Nowa Matura subjects are Polish Language and Literature, Mathematics, a Foreign Language, History, Physics, Chemistry, Biology and Geography. It is suggested that each candidate will take four or five subjects: two of the subjects, must be taken at a higher level. The list of examination subjects will be gradually increased.

4.2 Terms of Reference and Invitation to Tender

After much re-negotiating, delay and bureaucratic vacillation between Brussels (EU directorate) and the Polish Ministry of Education and the Polish Government, the original project for a training programme to reform Polish assessment system became combined for political, administrative, fiscal and (non-educational) reasons with three smaller but cognate programmes. The skill was to combine these four disparate reform programmes into a homogeneous programme which could be managed by a single contractor. For the purpose of bidding for the Contract, it was felt to be politically and culturally important to develop a dual Polish - English

⁴⁹ This information was taken from a presentation given by Bogmula Hispanska (MEN) at a TERM training session in Sulejówek, Warsaw, February 1996.

responsibility for project management⁵⁰ SMART instead of being solely concerned with developing a programme of National Assessment now had **four** Components.

The diagram below shows how these relate to the overall structure of the SMART Programme.

⁵⁰ In fact the strength of the bid for the contract was that we had a strong Polish partner the IBE, Warsaw. Actually, their presence was more titular than concrete. But the Polish HQ of SMART Programme and its subsequent minor programmes were located in the IBE.

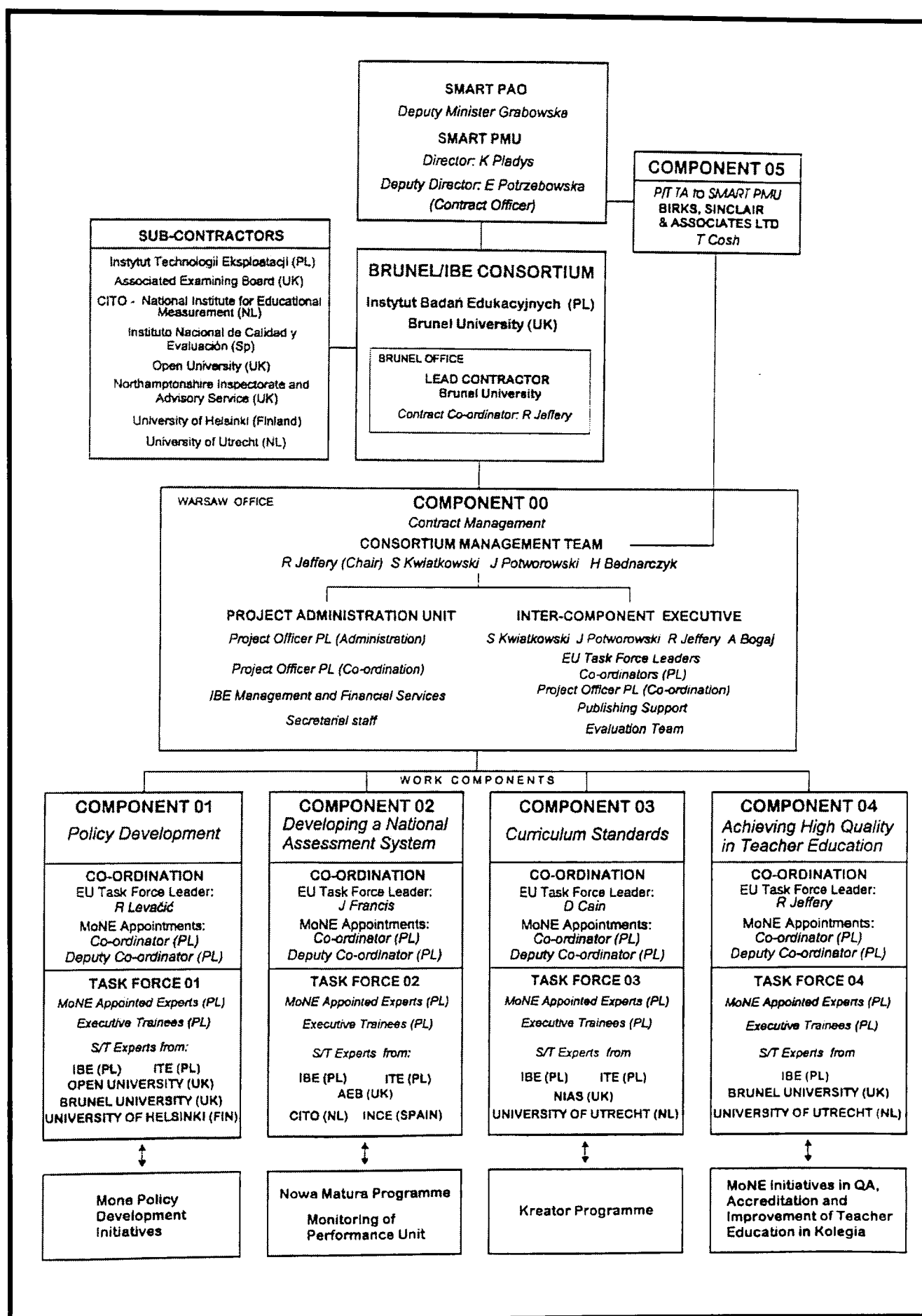


Table 6 Contract management structure for overall SMART Programme

The institutions, both Polish and from the EU, are listed as well as the names of those Polish and EU colleagues who have responsibilities.

This diagram represents the situation at the time of successfully winning the contract to undertake the work. Three months after signing the contract the Spanish organisation (INCE)⁵¹ withdrew.

There were four components of SMART Project:

Component 01:	Policy Development
Component 02:	Developing a National Assessment System
Component 03:	Developing Curriculum Standards
Component 04:	Achieving High Quality Teacher Education

Component 01 - Policy Development

This Component aimed to increase the ability of the Ministry of Education in Strategic Policy planning, analysis, evaluation and implementation, and in particular investigated key issues in the financing of education and strategies for improving school performance. This included enquiring into appropriate career guidance provision and involved the training of core staff.

Component 02 - Developing a National Assessment System

Two previous programmes TERM and Nowa Matura, the first funded by the EU and the second by the Ministry of Education Poland prepared the SMART programme of developing a National Assessment System.⁵² At the heart of this Component was the development and implementation of the Nowa Matura.

⁵¹ Institute for National Evaluation and Quality, in Madrid. This is a government funded agency. Its very able director was "replaced" after contract had been won and impossible barriers were erected which meant that the contractual arrangement could not be fulfilled ... and I had to replace the INCE at very short notice. I asked for DfEE assistance, through the Qualifications and Curriculum Authority and eventually after some considerable effort, succeeded in securing the expertise of the Scottish Council for Research in Education (SCRE) most ably directed by Prof. Wynne Harlen. This organisation worked at short notice very successfully to rescue an embarrassing situation and continued to provide expert input to the end of the SMART project.

⁵² In February 1999 it was decreed that there will be eight Regional Examination Centres, supervised by a Central Commission which would be governed by the Ministry of Education.



Figure 16 The Group responsible for national assessment in Poland of Core skills at 13+

Component 03 - Curriculum Development

This Component was codenamed KREATOR and this programme developed an introductory course in curriculum development and an advanced course to train Polish colleagues in the area of curriculum development which included the development and creation of teaching materials.

Component 04 - Achieving High Quality Teacher Education

The objectives were to develop and implement a National System of Quality Assurance and accreditation for Teacher Training in Kolegia with curriculum development in specific subjects and methodologies.

All of these Components had a strong element of staff development and involved dissemination from the key Polish staff to other colleagues and teachers.

As I was the EU leader of SMART 02, and although I worked very closely with the EU leaders of the other three components of SMART. I will ignore those Components but for sake of accuracy I will now refer to my Component as SMART02.

The *Terms of Reference* for SMART02 were:

- to provide an administrative system and regulations for pilot examinations in 8 Kuratoria in summer 1998 for approximately 1,600 candidates, taking 8 subjects in the Nowa Matura;
- to develop the necessary skills and knowledge of the administrative staff in each Kuratoria and the Subject Groups to enable them to undertake all the tasks required to run the pilot examinations;
- to develop the appropriate forms of assessment, support material, procedure files and Regulations for use in the pilot examinations;
- to prepare training materials for use in cascade training of teachers within each of the Kuratoria.

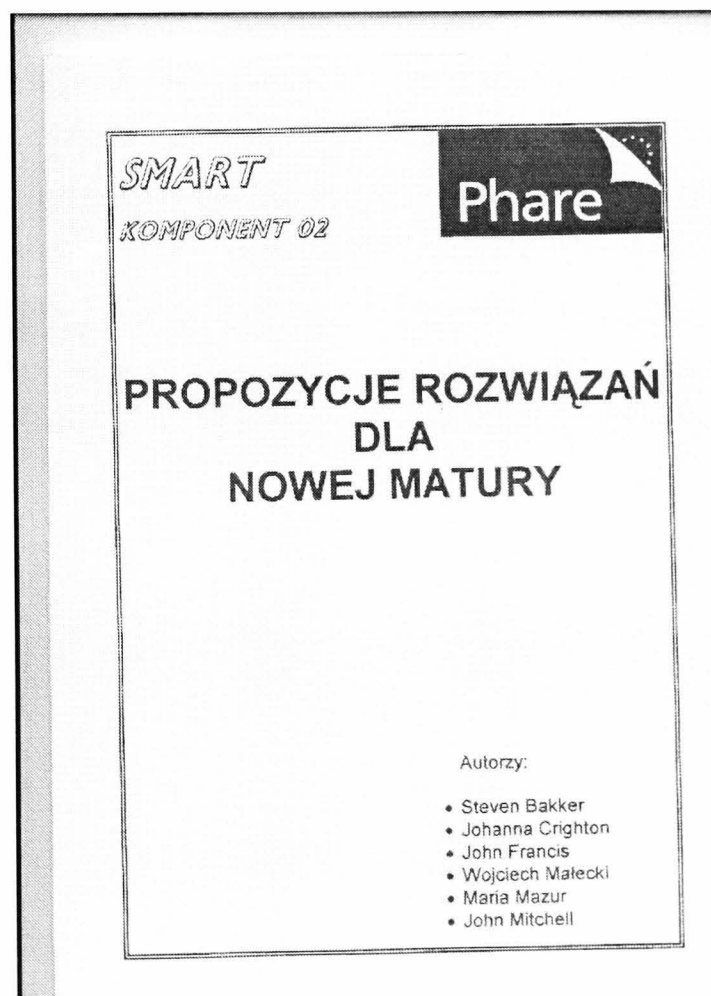


Figure 17 The Executive Group produced six *Position Papers* for consideration by the Polish Ministry of Education on crucial aspects of the *Nowa Matura*.

4.3 Work Programme

SMART02 Project was a *training* programme not an institution building project. The overall aim was to undertake the pilot phase of the Nowa Matura programme following the TERM project and to establish a Monitoring of Performance Unit. The focus was on training and establishing the infrastructure for the Nowa Matura to be put in place in 2002.

4.4 Sub-Component 1. Executive Management Group

The Executive Management Group comprising the Polish Co-ordinator and Deputy Co-ordinator, myself, plus three EU Consultants and four Polish participants were responsible for directing and managing the whole of the training programme of SMART02. This included the development of seven *Policy Documents*⁵³ (1999) of which the first six were finally published. This work was undertaken early in the programme in order that the Ministry of Education could have expert analysis of relevant issues relating to policy matters on National Assessment. An executive summary of these papers was prepared for the Ministry in the spring of 1998 to assist in policy planning and decisions regarding changes in national and local legislation and instructions and regulations relating to Matura and national assessment.

⁵³

1. Authority and Responsibility for National and Regional Examining Centres.
2. External and Internal Assessment.
3. The skills versus knowledge debate.
4. Levels in examinations.
5. Syllabuses for Nowa Matura.
6. The Nowa Matura certificate.
7. Nowa Matura examinations in Vocational Schools.

Figure 18 Executive Group of SMART02 outside the WOM in Krakow, in Summer 1997. (Photo by Maria Bialecka)

The Executive Group also planned in detail all 12 of the Subject Workshops⁵⁴, four of which also included two representatives from the eight Kuratoria involved in the Project. These people were administrators responsible for the organisation of the experimental Nowa Matura and were potentially the nucleus of the staff of the Central and Regional examining commissions. The Executive Group also was responsible for directing the co-ordination of all sub-components (see below).

The Executive Group appointed an official Polish archivist-translator who was responsible for the production of two important documents. Firstly, the *Catalogue of Examination Documentation* based on the functions of the UK based Associated Examining Board (AEB). This detailed collection of important and relevant documents was annotated in the Polish Language to be used to support the work each of the Regional Examining Boards and the Central Examining Commission.

The second document was the first contemporary *Dictionary and Glossary of Assessment Terminology* written in Polish/English and English/Polish.

⁵⁴ These workshops were attended by about 100 participants sometimes more, when all evaluators and visitors were present.

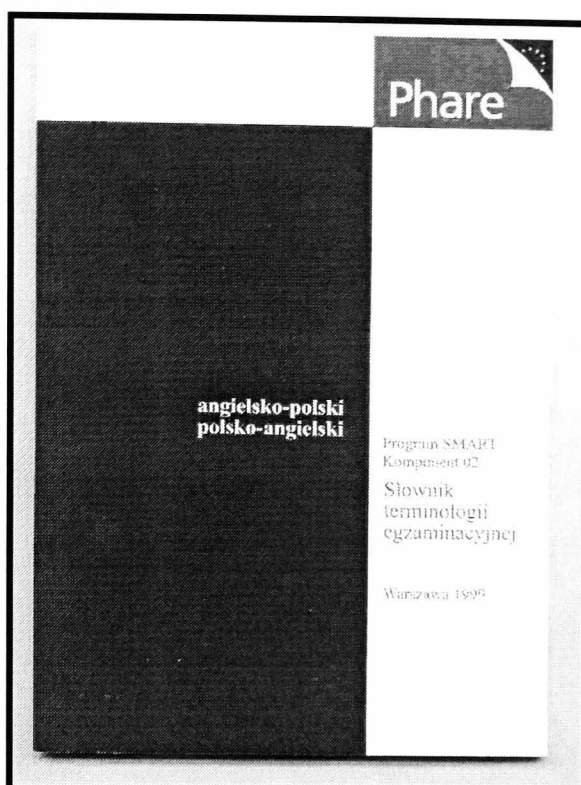


Figure 19 The published Dictionary was widely distributed.

These two documents became important instruments for training, particularly during Study Visits to the UK. The Objectives and Activities of Study Visits are given in Appendix C. A sample programme is given in Appendix D. The Executive Management Group was also responsible for directing the translation of a large number of documents from Polish to English and English to Polish in order to assist the discussions and training workshops both in the EU and in Poland.

The Polish Co-ordinator and Deputy were responsible for making preparations on the Polish side for the Study Visits⁵⁵ of each of the Subject Groups who visited the UK (twice) and the Administrative Group. This group of 16 people (plus the Polish Co-ordinator and Deputy) was split into two for the UK visit, and the two groups visited at different times and had different training objectives.

Other visits were made by the IT leaders of Sub-Component 4, the group of Evaluators (under the leadership of Prof. Helen Simons) and the Executive Group. A number of additional Study Visits were made including members of the Ministry and latterly the Heads of the Regional Examining Commissions and the Central Examining Commission. The 27th and last Study Visit was made by staff from the

⁵⁵ Study Visits were a major item of expense, very influential in their effect and highly prized by participants. Immense planning went into them and one member of AEB staff was allocated to their management.

Central Examining Commission in May 1999. Apart from the Evaluators visits, all UK Study Visits were designed, organised and led by myself, supported by colleagues from The Associated Examining Board.

The outcomes of the training and development activities of all groups are listed in Appendix B: *Achieved Outputs of Groups*. In order to achieve the successes listed in this document, I endeavoured to find ways of assisting the groups to work coherently and to develop team spirit. This included arranging team building activities⁵⁶ as well as making sure there were regular plenary sessions where participants could express their points of view to the Executive Group.



Figure 20 **A regular feature of SMART02 training workshops was feedback from Subject Group leaders to the whole group.**

We experienced considerable problems at the start of the programme because of the delay of six months between gaining the contract (November 1996) and the signing of the contract (May 1997). We could not have a smooth transition between the end of TERM project and the beginning of SMART02, we could not spend money, from the Project, although in fact we did continue with planning but at our own companies' expense. This meant that we had only one full team meeting before the long summer holidays intervened. No real progress could be made until September 1997. However, once the different groups had their second workshop in

⁵⁶ I explore this aspect in detail in Chapter Five. Each Friday and Saturday, we (the Executive Group) planned what became known as "Niespodzianki" - literally "Surprises", or entertainments - some planned well in advance (Fancy dress balls) and some actually were a surprise to the participants (Treasure Hunts).

September, progress was made very quickly. This was undoubtedly due to the fact that the majority participants in the programme had been involved in the precursor TERM Project.

Each of the 8 subject groups had an academic leader - a university “champion” who provided academic rigour, status and support. This was particularly valuable in the later stages when the Executive Group set up A subject based meeting with most of the Polish universities to discuss the development of the Nowa Matura and in particular to argue for its use in providing an entrance qualification for university in a similar way to A Level GCE in the UK. The role of the subject group leaders and their academic co-leaders was crucial in building good teams and also in managing and directing progress.

SMART provided continuity of training (from TERM) for many participants, thus developing further the relevant skills of Polish teachers over a period of time. From this, there is indeed a political lesson to be learnt about valuing the contribution (often from people who are already very committed) to educational reform programmes. The Project was instrumental in developing to a very high level the skills of approximately 100 Polish educationalists. My main concern was that these skills would not be thrown away and that the well trained people would be used in a significant way to establish the National System of Assessment: and that they would not be sacrificed on the altar of political or personal doctrine or dogma. The active engagement of trained teachers in this task was to be particularly important. In fact, most participants were offered roles in the national assessment system, but half of the key top posts went to politically correct, non-trained people. Some very able and competent people were down graded or sidelined.

4.5 Sub-Component 2(a) Eight Subject Groups

Each of the eight Subject Groups were successfully led by a Group Leader and all Groups, bar one, had very valuable input from an academic expert acting as co-leader. The Group Leaders played a very significant role in the successful completion of the tasks of producing syllabuses, pilot examinations and marking schemes and undertaking the pilot examinations themselves. A huge amount of administrative work was required in order to produce the pilot examinations and a

great deal of processing was undertaken through the Polish head office of - the WOM in Wrocław.

Although English language training was provided at various intervals and in various modes⁵⁷ as part of the contract, progress in the Subject Groups was considerably hampered by the lack of English Language amongst Polish participants. Most Groups reached a *modus operandi*, whereby whenever it was essential for Dutch and English consultants to know precisely what was going on, detailed translation was provided, otherwise presentations and seminars given by English-speaking consultants were translated, either by interpreters or by the members of the Group who had high level of English Language. Only one subject, the most important group in terms of Polish credibility had no one with the ability to speak English - this was the Polish Mother Tongue⁵⁸ group.

Figure 21 The Polish Mother Tongue group and AEB consultants, staff and interpreters during their Study Visit to AEB in Guildford, England.
(Photo by Jenny Schermbrucker)

⁵⁷ One and two week "holiday schools" were arranged at intervals; one-to-one tuition was funded, together with opportunity to use distance learning, including access to multi-media tools.

⁵⁸ Affectionately known as the PMT, this group had responsibility for developing the national syllabus for everything that represented Polish Culture, including Polish Literature and Language (much the same thing as most History is embedded in Literature see reference to Pan Tadeusz in Chapter Three). The very essence of Poland was their responsibility. A lovely group to work with, but they were let down by the choice of academic co-leader - an ineffectual academic who was a non-contributor. The lack of English language meant that they needed much more support.

The Polish Mother Tongue Group, had to have a full-time interpreter present in order to enable the Group to function. In addition, I provided a UK-based interpreter(s) whenever this Group was split up into smaller sub-groups for Study Visits, for example to schools in the UK.

The Study Visits to the UK were a very important part of the training. The first Study Visits included attendance at the relevant Subject Conferences in the UK⁵⁹. These were not always universally successful as the lack of English Language ability of the Polish participants meant that much of the value of attending the Conferences was negated. However, there were benefits in observing how UK teachers interacted, used materials, worked together - in other words the social, psychological, cultural, political, economic concomitants of UK education and examinations were experienced. This certainly helped to contextualise the other training they were receiving from UK consultants.

The second Study Visit, generally held six to nine months after the first, proved to be far more valuable in that not only did Polish participants

understand far more about what their needs were but also they were better able to declare in advance of the visit what they believed to be the specific requirements which could then be designed into and delivered during the Study Visit.

An extremely important aspect of the whole of the training programme was to contextualise the training in order that Polish participants could understand the reasons behind the methods used in the UK (and later Dutch) context. Unfortunately, this was not possible with respect to the Dutch system as only a few, selected Polish participants from Subject Groups (together with newly appointed heads and deputies of Regional Examining Commissions) were able to attend the Study Visit to the Netherlands (April 1999).

⁵⁹ Very problematic for the PMT group who went to the National Association of Teachers of English (NATE) conference (the nearest equivalent experience for this group), but with no understanding of English they got very little in terms of developmental inspiration out of it.

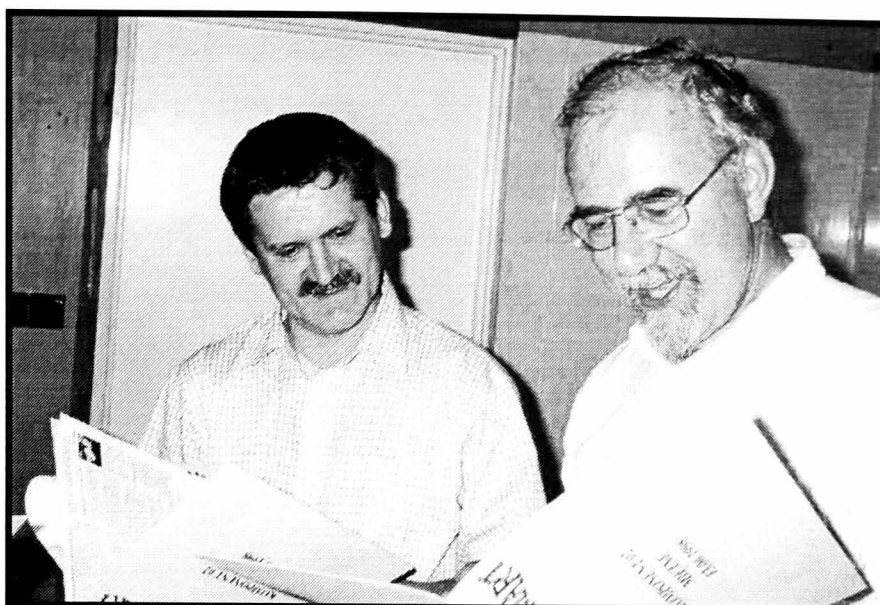


Figure 22 Marek Legutko (left) Group Leader of the Mathematics Group and later appointed to Director of the Kraków Regional Examining Commission with Henk Schuring, CITO Consultant.

One of the major lessons to be learnt from this experience is the need to understand something of the historical, political and cultural background which underpins educational policy, strategy and planning in a nation. This is as true for EU consultants working in Poland as it is for Polish participants working in the EU. The evaluation of the TERM Project was severely critical about the lack of a realisation that the Polish and EU cultures were different and (in the terms of this thesis - “problematic”).

It was clear that for those Polish participants who had previously visited other countries and had experienced the different educational systems prior to SMART02 were able to gain greater benefit from their Study Visits.

It is a strong recommendation from the experience of this Project that for future similar programmes more resource is provided for Study Visits outside Poland to more countries than was possible in this programme and for dissemination of results of these visits, e.g. in form of reports with conclusions. An example of a Study Visit Programme is given in Appendix D.

4.6 Sub-Component 2(b)

Monitoring of performance Group

The main tasks were to train Polish colleagues to establish and administer a Monitoring of Performance Unit (MPU), to produce tests for Key skills, and to report on pilot test results. Training was achieved and a pilot study successfully completed. Changes in circumstances within the Polish Educational system

involving the assessment of key skills after Primary school and Gymnasium, enabled the group of Polish participants to form the nucleus of a permanent National Assessment Monitoring Unit. Also, trained Polish workers are available as a resource, if needed, especially in the case of the international comparative studies organised by OECD. The Key Skills Tests were produced and could be used for a future large-scale survey.

There were considerable problems at the beginning of the programme in that the designated sub-contractor, the National Institute of Quality and Evaluation in Madrid, Spain withdrew at the last moment and had to be replaced with another organisation, the Scottish Council for Research in Education (SCRE). In the event, the six-month delay which was engendered by this change was more than made up for by the extremely efficient and effective approach which was adopted by the SCRE.

An additional problem was that a number of the original Polish participants withdrew after the first Study Visit to Edinburgh, in December 1997, on the grounds of incompatible approach to methodologies.

4.7 Sub-Component 3. Administrative (Kuratoria) Group

This Group achieved successful coherence within a short period of time and their major achievements were to produce draft *Regulations and Procedures* for the conduct of the Nowa Matura Pilot examinations in eight subjects. This Group also successfully produced detailed schedules, timetables and programmes which are now the basis for the work of the Regional Examining Commissions. They developed blueprints and specifications for the structure and functioning of these organisations. The Group was also instrumental in devising a programme and methods of disseminating the Nowa Matura to a wider audience of teachers and parents.

The Study Visit of this Group to the UK was split into two halves: half the Group attending in March 1998 and half in July 1998. The training in the UK was very intensive and focused in detail upon the processing of examinations and the procedures required. A great deal of documentation and other material was collated and issued to this Group, in spite of the fact that members of this Group

were all extremely pressured in their own working environment and had very many demands upon their time.



Figure 23 Some members of the Administrative Group, with David Wimpenny, AEB consultant (centre front row) during their Study Visit to The Associated Examining Board, Guildford in July 1998. Each group received a certificate listing the objectives achieved during their Study Visit. (Photo by Jenny Schermbrucker)

Training in the writing of Examination Procedure Files using the extensive exemplar material and resources from The Associated Examining Board was very successful. The Administrative Group used and adapted these materials to produce working Procedure Files and other supporting documents for use in the Regional Examining Commissions.

The commitment of all members of this Group was outstanding and it must be remarked that the speed with which new ideas and methodologies were understood and adopted was remarkable.

4.8 Sub-Component 4. IT Development

Work on this Sub-Component came late in the programme because until details were fixed regarding the structure, function and administration of the examining boards, there was little point in looking at the data processing of examinations. In the event, preliminary visits to the UK were made by the Polish Co-ordinator and

two Polish experts from the IT Group in January 1999 to discuss data processing systems operating in UK examining boards such as the AEB, local government, the Fire Service and the Police.

Following this, two intensive Workshops were held in January and March 1999 in Wrocław. As a result of these Workshops specifications for data processing were identified and various options delineated in a detailed Report produced by the members of this Group.

A number of options are still open to discussion. These will depend on decisions yet to be made by the Ministry and the Central Examining Commission and are also dependent upon the resources available, particularly personnel and equipment.

One possibility is to utilise an already developed Examination Software System (FAIM)⁶⁰ which is operating successfully in many places in the world. While this system is not expensive to purchase, additional funds will be necessary to support staff development and training in its use in Poland. A second issue, although this need not be particularly inhibiting, is the fact that this material is still written only in the English Language. Translation of the programme into Polish will be relatively straightforward.

4.9 Sub-Component 5. Dissemination

The methods and means of dissemination of information were prepared through two Workshops which were held in December 1998 and February 1999 in Poland, and skeleton plans were drawn up by Subject Groups and Administrative Groups working together. Despite the fact that much of the material required further development, already much the valuable work was done in preparing suitable programmes and material.

⁶⁰

FAIM is the registered mark of HAMLET Computing, Alton Hants, UK.

While the responsibility for implementing this will come through the Dissemination Department of the Central Examining Authority, based in Wrocław, under the direction of Wojciech Małecki much valuable work was already undertaken to draw up programmes and materials which will be required.

It is observed that one of the biggest difficulties to the successful implementation of a National Assessment Scheme will be winning the hearts and minds of stakeholders, particularly teachers and parents. The role of dissemination cannot be over-emphasised and requires very considerable resource in order to successfully implement it. It is by no means certain that the enthusiasm, understanding, experience and expertise of participants in the programme is shared by colleagues outside it, who will have to implement it.

4.10 Sub-Component 6 Evaluators' Group

The first and major task was to establish clearly what it was feasible for the evaluation component in the SMART02 programme.

The Polish evaluators comprised three experienced university members and three "assistants". The evaluators were included in this programme without a clear definition of their role, except to help development and management of the programme. Different people in the programme had different views of what this meant and evaluators had different styles. Their previous training had been in summative, impact evaluation, rather than formative.

The function of the EU expert was in advising and assisting Polish evaluators to frame policy of formative evaluation of the programme, training them in the skills (which was a major shift in their experience from conducting impact evaluation in TERM), commenting on report writing, advising how to present critical feedback informally and formally to enhance development of the component, providing additional training in observation and presentational skills, writing key statements of evaluation role and function.

Evaluators were trained in how to observe without intervention, how to report responsibly without breaching confidentiality and without judging and how to write and frame critical feedback that would be helpful to development.

Although at the beginning of the programme there was concern that the evaluators were not being seen and were not making themselves known to participants, later on in the programme Evaluators were fully participative and the Polish Leader gave a major presentation to the plenary session in February 1999.

At my request, together with the leaders of Component 02 I was able to clarify and help establish a common view of the evaluation aspirations in this programme. The *Final Evaluation Report* (Korporowicz, et al 1999) has been used to inform The Case Study findings in Chapter Five.



Figure 24 The Evaluation Group with Prof. Helen Simons (3rd from left) in Miętne. Prof. Lezek Korporowicz, leader of the group is seated 2nd from right.

Towards the end of the programme, there was evidence on both sides that the function of formative evaluation was beginning to be understood more clearly. However, there are still issues that need development in the future about the nature and status of informal feedback (and who receives it) compared with formal feedback (and who receives this - participants in the programme, for example, as well as leaders) and the differences between the evaluation role and the

development role. The two need to be clearly distinguished if one is to facilitate the other.

4.11 Building on Experience

In this Chapter I have summarised, with little comment, the nature of the work undertaken in SMART02. The formal Outputs are summarised in Appendix B. In the next chapter I want to examine the interaction between my leadership strategy and methods and participants' motivation, behaviour, attitudes and consequences. In that chapter I will return to issues raised in Chapters Two and Three and show how the theories and models set out there were applied to The SMART02 Case Study. In Chapter Seven, I draw these together to advance some ideas on how to manage trans-cultural projects and perhaps lay down some suggestions for the future.

CHAPTER FIVE

A Critical Evaluation of the Management of the SMART02 Project

In this chapter I will comment critically on the management of the SMART02 Project with respect to a number of issues which will lead into a more detailed analysis of the strengths and weakness of the management of the Project. Some of the points I discuss are particularly relevant to working within EU financed projects, some are more general regarding strategic matters and some issues are pertinent to current administration in Poland.

5.1. Situational and political factors

The structure of the SMART Project (Strategic Measures for Achieving Reform Targets) was complex. There were 4 Components of which the one for which I was responsible was 50 per cent in terms of funding and activity. There were 5 strands or Sub-Components within my responsibility. There were 13 separate working groups. The team of Polish Evaluators worked closely with us and my work was further monitored by a Polish Project Management Unit (PMU) with one full-time monitor allocated to my Component. There was, in addition, an Inter-Component Executive (ICE) which added another layer of monitoring and evaluation (see Table 6, p 50 for a schematic of the Project command and control structure). Fee payment was achieved on successful acceptance by the PMU and MEN of the Quarterly Reports setting out activities and outcomes achieved.

All plans and proposals had to meet criteria set down by the European Union (the PHARE Programme), Polish MEN and PMU and the SMART02 Project's own criteria. Each individual request to vary the original Technical and Financial Proposal to the Terms of Reference had to be justified. It is the nature of projects that they change and require flexibility and active management of the process. It was here that there was a serious clash between the style of management of the Project which was normative for Western Europe and the style of management still embedded in former Socialist Block countries. While there may have been a change of regime in Poland, there were still in-grained habits of thought and action

which were symptomatic of the command economy. This was to be signified by a reluctance to take risks or even make decisions.

A very significant part of my learning during this Project was in identifying not only, the problems that presented themselves as barriers to progress, but also in identifying the reasons and causes of them. In many cases, in reflecting on my actions using the rich resource of my critical community⁶¹, I was able to have greater insight into solving the problem and attempting to resolve similar problems. There appeared to be reluctance to take (risky) decisions or innovative action. Was this a legacy of Socialism or did it lie deeper within the Polish culture? There was historically a convention in former times in the parliament whereby no action would be approved unless there was a unanimous decision⁶². A single objection would be enough to abort any proposal.

An example of such a situation was the inability of Ministers in the Department of Education to make a decision on the financing of Regional Examining Commissions in Poland. We had prepared a number of Policy Papers which set out options to aid decision-making. The subsequent delays to the establishment of Regional Examining Commissions created increased tensions and uncertainties about the future of participants' careers and led to some strong criticisms of the system and adversely affected the effectiveness of the SMART Project.

Polish counterparts could also not take action not because they did not know what was required, but because the higher authorities - Civil servants and politicians at a senior level - would not make firm and concrete decisions. This meant that it was difficult to establish a clear direction on a number of issues in the Project and was frustrating to both Polish participants and those from the EU. It would have been counterproductive for EU participants to intervene in a Polish situation even though there was a temptation to do so. Applying normative western European tactics would have destroyed trust and the self respect of colleagues. It was the rightful role of Polish colleagues to work through this situation without interference - in my judgement - from EU consultants.

⁶¹ I developed close relationships with a few Polish colleagues in SMART which enabled me to obtain more frank views about my leadership style and methods.

⁶² Known as "*Liberum verbum*" this was a way of emasculating the power of the Polish democratic system.

More direct intervention might have been construed as taking over the leadership role of the Project from my Polish counterparts. Rather, I wanted to help create the circumstances in which Polish leaders could develop their autonomy. One method of doing this was to ensure they had support from my Western European colleagues on the Project by not interjecting, interrupting, overruling or diverting the theme of the discussion. Also I advised them to be patient when the discussion was in English and Polish native speakers were not fluent enough to keep the pace of debate from faltering. It was important to allow Polish colleagues to develop their arguments (speaking in Polish) and explore potential solutions⁶³.



Figure 25 A plenary session in Miętne with Maria Mazur, Deputy Polish Co-ordinator of SMART02, in the foreground.

5.2 External factors relating to effectiveness of participants' training

At this point, I need to make some general comments about the training model imposed by external circumstances. Bringing together Polish representatives, whether they be subject experts or administrators from different regions of Poland

⁶³ The style of discussion within groups was so different from that experienced in Western Europe that it took me about a year to develop group discussion skills to a position where negotiation and mediation could take place and consensus emerge. I had problems with one member of one group who had very clear opinions - which were indubitably correct but insisted on "stuffing them down our throats". The point being that we wanted to reach a collective solution, decided by the group, not merely accept the expert knowledge of one person.

for 3 to 4 day Workshops every two months⁶⁴ did create problems. Firstly, there was a lack of continuity between Workshop sessions and retro-active interference between the Nowa Matura and SMART02 Projects. This was more problematic in the early months before the groups established themselves.

Secondly, the Group Leader bore a disproportionate burden of work in having to both co-ordinate the work of others in the interim periods between workshops and also take upon him or herself the responsibility of collating, editing and presenting the work. In addition, group leaders also had to undertake other responsibilities which were not necessarily identified at the outset and not adequately paid for during the course of the Project. The quality of work from the Group Leaders, particularly in subject groups, was outstanding.

Thirdly, the method of training outlined in more detail in Chapter Four was obviously determined by practical considerations, principally that teachers could not get permission to be released from their school duties for longer periods of time than two days a month. Fourthly, some of the training, for example on producing internally assessed components, depended upon decisions from the MEN and unfortunately there were major delays in making some crucial decisions on the place of coursework in the examination, whether there would be one or two Levels, and many issues relating to the actual content of the National Curriculum, which changed shape many times throughout the Project. Inevitable these delays meant a hiatus in planning and carrying out effective training.

Fifthly, the contract stipulated that the training would be undertaken in the medium of English Language. Even by the end of the Project, this had not been achieved, because none of the groups were sufficiently proficient in English Language for English to be the medium of instruction. Whilst one-third to a half of most groups were able to comprehend English, in almost every group the more fluent members had to interpret and translate on behalf of their colleagues. In one group in particular, the Polish Mother Tongue Group, there was a significant barrier to progress, particularly in the early stages, as none of them had sufficient grasp of English for sessions to function without tedious interpretation.

⁶⁴ In fact many of the SMART participants were also working on the Polish financed and administered development Programme known as Nowa Matura which had, confusingly, similar goals, so that these people were attending workshops every month.

Some individuals on the SMART Component 02 programme consistently refused to make an effort to learn English and were considerably hampered in their ability to benefit from the training. Other members of the programme made substantial and significant progress and became proficient to an advanced level by the end of the SMART programme. This undoubtedly enhanced their understanding and ability to make a significant contribution.

5.3. Comments on training methods

With respect to the training methods used during the programme, there were three main methods:

- modelling good practice through the development of assessment materials;
- the observation of assessment processes and procedures;
- the discussion of systems for assessment processing and product development.

The amount of input of theoretical information which was provided by EU consultants was restricted to that which was absolutely essential for progress to take place. Wherever possible, practical demonstrations of procedures and processes and systems were given. One of the key features of the various group Study Visits to the UK, for example, was to make the learning appeal to the visual sense, through participation in activities, observation of class teaching and the inspection of materials of all kinds, including computer software. Presentations focused on using operational examination and assessment material and much effort was made by EU consultants to provide exemplar material and discuss these with participants.

Material was provided to all participants both through direct access during visits to schools, colleges, examination authorities and also through distribution at Workshops. Much of this was annotated, collated and documented by the Project Archivist, a member of the Executive Group.

Indeed, an Annotated (in Polish) *Catalogue* of examination material, and an English/Polish - Polish/English Dictionary and Glossary of Terminology⁶⁵ relating to assessment and examinations, now reside within each of the Regional Examining Commissions and Central Examining Commission.

One clear observation from the training was that exposing participants to a single experience, for example, in the case of the first visit to a school, was of very little value⁶⁶. Any visit such as this had to be followed-up, reinforced and repeated (which generally speaking they were) in order for the concepts, ideas and experiences to have meaning. Generally, the model of training used was that of a "spiral" where experiences were built upon, developed and then internalised and implemented by participants. From an anecdotal point of view, it was very gratifying to hear participants referring positively to the value of their Study Visits during later Workshops, comprehending these experiences, relating them to their own context of work and then sharing them with colleagues.



Figure 26 The IT Group were trained in Wroclaw by Peter Child (Head of Information Technology, AEB) second from the right. Note the flipcharts used to record the ideas about developing examination computing systems.

⁶⁵ Both were published by the MEN in 1999.

⁶⁶ A typical reaction of a science teacher on observing a skilled lesson using a well equipped laboratory was - "If we had that kind of resource we could teach like that". This, of course was not the point, and effort was made to put the observation of western European teaching in schools into the context of the prevailing culture and delivery of the National Curriculum - which included the economic situation but was not overwhelmed by it.

5.4 Polish Participants

As the main focus of the Project was training; the quality of the Polish participants, as well as the calibre and experience of the EU consultants, was crucial to success. One of the most positive features of the SMART 02 Project was the high level of commitment of Polish participants to the success of the Project. Inevitably, there were one or two participants who did not meet the challenge of the training programme and they either left and were replaced, or were 'carried' by other members of their Work Groups. The selection of these key people was the responsibility not of the EU consultants but of Polish colleagues. It would have been more beneficial for the Project if I taken part in consultations with those making the selection decisions in Poland.

The very high level of dedication of Polish participants was self-evident to those of us who were working alongside them. The SMART02 Project was a training programme under the responsibility of the Ministry of Education. It was clear that part of the motivation of participants in SMART02 was the strong possibility or certainty that they would continue their career path into employment in one of the Regional Examining Boards or the Central Examining Commission in one capacity or another. This expectation certainly underpinned their tolerance of high degrees of workload engendered in the programme. Some participants were not appointed to posts of responsibility within the eight Regional Examining Commissions and the Central Examining Commission⁶⁷. This will create a negative backwash effect on other similar training programmes in the future in Poland.

In the implementation and dissemination of the ideas developed during the Project, some doubts were expressed about how well-prepared teachers in Poland will be to accept these ideas. For example, the Nowa Matura in Science subjects will require changes in didactic and pedagogical style and possibly the use of equipment which might be currently in short supply. The continuity of the Project into institution building and dissemination to and training of all teachers is the responsibility of the Polish government.

⁶⁷ The reasons for this have been previously dealt with.

5.5 Administration and Control

In any extensive and significant Project such as SMART 02, plans made in *the Inception Report* and its precursor (*The Response to the Terms of Reference*) inevitably need to be changed in the light of changing circumstances and personnel to meet new challenges and situations and an excessive time-lag between decision-making and implementation.

The fact that essential equipment, such as laptop computers, printers, scanners, were not installed and available for use until well over half of the . As the EU Task Force Leader for SMART02, I felt that there was an over-bureaucratic approach to the granting of changes to the programme, permission to undertake legitimate and valid activities (such as organising

Study Visit arrangements⁶⁸), a lack of flexibility programme had been completed, significantly hindered the ability of groups to produce material and prepare documents for publication. This was in part due to the Project being EU financed and the EU rules meant that there were long delays between ordering large quantities of ITC equipment and its procurement and delivery were inevitable; but the situation was not improved by a long chain of control in Poland and the change of decision-making personnel, both in Brussels and Poland and the (too) long summer break. Some quite petty matters such as the lack of photocopying paper or sufficient printers for PCs during workshops made working conditions quite intolerable and were bitterly resented by participants.

⁶⁸ Getting permission for Polish participants to take part in study visits or international conferences was a major task involving overcoming enormous bureaucratic barriers. It was almost as if, Poland was still under a Socialist government determined that no one should experience the "freedoms" of the decadent West.

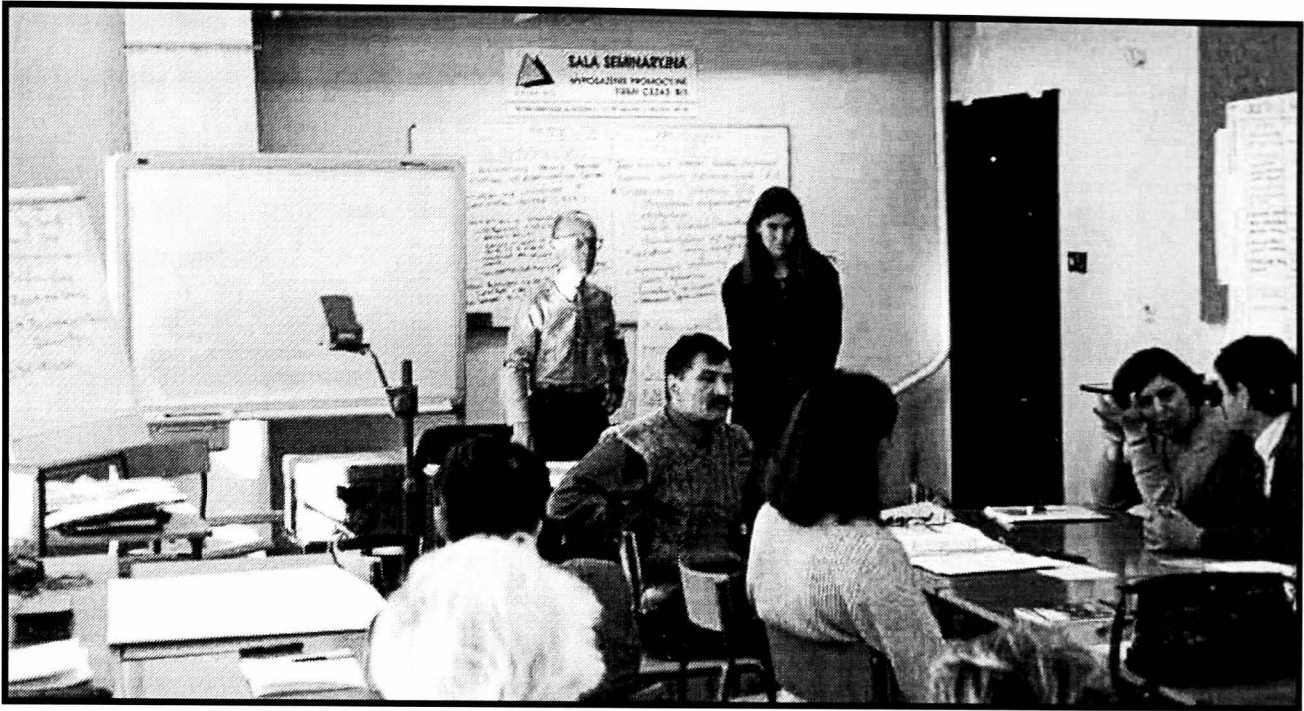


Figure 27 Most of the workshops were held in well-equipped venues, but often limited access to PCs and printers frustrated participants and resulted in long queues and working late into the night.

Changes in regulations, whether financial, fiscal or administrative, again caused unnecessary and irritating additional work. There was a prolonged argument between the ICE and the Polish authorities over the question of whether the small stipend paid to Polish participants would be taxed at source or not. It had to be admitted, that there were times when both Polish and EU participants felt that the burden of bureaucracy was too much to bear and the patience of colleagues had worn out.

An outstanding problem was to reconcile the demands of achieving satisfactory scheduling and preparation of final publications with the requirement to produce sufficiently high quality material to be published. Particularly, in the case of Subject Groups who were still working up until March 1999 on finalising the complex material which makes up syllabuses, question papers and mark schemes. This, in particular was a systems fault and not a 'people' problem in that the requirement to publish before the end of the period of the programme would have required the completion of all activities 4 months before the programme was due to finish. The considerable delay in the initial work of all components because of the lack of adequate equipment such as laptop computers seriously hampered the production and discussion of draft material and, for example, resulted in many workshops with

participants working well into the small hours of the morning to prepare and photocopy the work undertaken during the day.

5.6 Finances

In a similar vein to the points made above, the need for flexibility to move money from budget sectors (once experience had been gained about costing the different elements in the programme) was problematic. Through skilful management of flight ticket costs, considerable savings were made which could potentially be used to fund additional study visits outside Poland. But it was almost impossible to convince the bureaucrats that it was possible to re-allocate funds to meet the changing requirements of the training programme.⁶⁹

The time-lag in getting information, reimbursements and the general lack of good quality information meant that the financial situations were often unclear and the ability to spend money effectively was hampered. Another irritation in the programme was the need to supply excessive amounts of evidence of expenditure and also that VAT ⁷⁰could not be recovered⁷¹. I know this was outside the scope of the Polish Ministry, but this was an irritation nonetheless.

5.7. Relationships between the Components of SMART and other Participating Bodies

I have already referred to the excessive amount of bureaucracy and inflexibility within the programme. What was not particularly clear to participants, especially

⁶⁹ The attitude of the civil service in Eastern (former Soviet bloc) European countries is normally negative towards responding to the need to make changes to "fixed" programmes. It is not in the nature of the system to accept that adjustments are needed. The Plan once accepted, is sacred. They cannot respond in a flexible and adaptive manner. This is a major difficulty facing western European investors in former Soviet countries.

⁷⁰ So in effect we were absorbing 17.5% of the costs where VAT was levied! There is an erroneous view that that EU projects provide consultants with a "pot of gold"!

⁷¹ Claims for expenditure had to be original copies for Polish authorities, EU in Brussels and one's own company. We managed to circumnavigate these conflicting requirements by ingenious and deft accounting techniques which were devised by the main contractor - Brunel University. I shall ever be thankful for the wise and steadfast leadership and management of Bob Jeffery, EU main Contractor for SMART, who kept us informed, solvent and sane.

Polish participants, was the relationship between the components of SMART, the PMU and the Ministry. In particular the frequent change of personnel in the Ministry of Education and the resulting changes of policy meant that groups were not always certain of what requirements they were working to. The delivery of the SMART02 Project would have benefited from a strong sponsor in the Ministry of Education, who could endorse the action of the Executive Group of SMART02, champion the project with determination and also to provide continuity.

5.8 Quality Assurance

The SMART02 Project was conducted in an open arena. The training sessions were open to observation by civil servants and politicians from the Ministry of Education and indeed other ministries. Each session was inspected by a member of the project management unit from the ministry. The Team of Evaluators produced an interim and final report which was freely available. Monthly progress reports were submitted to the Inter-Component Executive and quarterly reports to the PMU and Ministry. Payment of fees and other costs were dependent upon the acceptance of the Quarterly Report.

The first public activity was the conduct of the pilot examinations in May 1998. These were undertaken in 8 of the Local Authorities and involved teachers, administrators and local government officers. Anyone was free to comment on the process and materials involved in the pilot examinations. All the material was published and disseminated and therefore available for inspection and comment. Each subject group held a three-day meeting with university professors from all Polish universities to discuss the development of the Nowa Matura within SMART02. This was both a Quality Assurance and promotional activity. As SMART02 was a team effort and all materials were published in English and in Polish, it was possible for all participants to comment and criticise and review materials⁷².

⁷² At one point there was concern about the work of the Monitoring of Performance Unit's Assessment Materials and so a one-day specialist seminar was held to discuss the materials which involved experts from the Nowa Matura subject groups. As a result quite a number of recommendations were made and the quality of the Monitoring of Performance Unit's tests were greatly improved.)

5.9 Public Relations

Public Relations was the responsibility of the Kuratoria and the Central Ministry of Education. A great deal of interest was expressed nationally in the work of SMART02 and an Education Magazine *Perspektywy* regularly carried articles by leading Polish participants in SMART02 such as Wojciech Małecki. A series of videos were made of conferences held to discuss the significant changes that the Nowa Matura would bring to Polish education and these were distributed widely. The TV and Radio and National Newspapers regularly carried news items and particularly interviews with the Vice-Ministers responsible for the Nowa Matura. Local Education Authorities published handbooks containing sample material and specimen questions about the Nowa Matura. The EU-funded Project had no responsibility for PR apart from attending specific ministry-led seminars and conferences and presenting work in progress.

5.10 Overview

I have looked at a number of management issues and their effect on the working of SMART02 at the instrumental (or mechanistic) level. The complex management structure affected adversely the speed of decision making. There were many tiers of vertical control as well as complications with horizontal (inter-component) control. The four components of SMART were managed as if they all had the same characteristics, needs and pace of development which they did not. There are however other management issues which are in the affective domain. These will be discussed in Chapter Six.

Chapter Six

A critical evaluation of the management of the affective aspects of SMART02

In my role as action researcher and participant observer I treated the commonplace events and activities of the “actors” as phenomena in their own right. The most mundane activities of social interaction have in fact a highly organised and systematic nature. It is because these activities are so commonplace that they remain normally, unrecognised as being problematic. This becomes a matter of serious concern in trans-cultural interactions, where the very taken-for-grantedness of activities creates problems of understanding and interpretation. In this Chapter, I evaluate the way in which the *affective* aspects of project management were undertaken. These include a discussion of the different agendas identified by the participants; the issues which affected participants’ motivation; communication, leadership and team building matters and the barriers to shared understanding.

The main conclusion to the SMART Evaluators’ Final Report⁷³ was that the one aspect of the Project which most influenced the successful achievement of its objectives was meeting the affective needs of the participants. In particular, motivational factors appeared to be critical to the success of SMART. A second finding of the Evaluators was that the level of efficient communication (something already explored in detail in Chapter Two) was critical to the project’s effectiveness

The purpose of this chapter is to look at these two issues and examine the way in which the affective aspects of SMART02 were managed.

⁷³ Evaluators collected extensive data throughout the period of the project. There were:

- 48 *non-participatory observations* of the Subject Groups activity; interaction between participants, between participants and EU consultants or academic advisers;
- 21 *focus group interviews* with groups of participants;
- 212 *semi-structured* and *in-depth interviews* with participants, consultants and academic advisers;
- *documentary analysis* of the training materials, syllabuses, pilot tests, marking schemes, self-evaluation questionnaires etc.



Figure 28 The fancy Dress Party included a rendition of the SMART02 version of the famous Polish epic poem: Pan Tadeusz

6.1 Effectiveness of developing leaders and teams

At the outset, I recognised that creating project effectiveness relied on developing strong leadership⁷⁴ and building a team that believed in itself and could sustain considerable setbacks and still achieve the project goals. The importance of team building was paramount: not only to build the small teams - such as the 8 Subject Groups but also to create a powerful group spirit for 100+ Polish participants, Polish evaluators (who were not surprisingly somewhat remote from the whole group at first) and EU consultants. I felt that we were going to experience considerable difficulties throughout the project, lack of certainty, shortage of materials and administrative and of course financial problems⁷⁵. We certainly did have a lot of problems. In order to survive the discomfort of these and the disruptive changes of direction and personnel, we had somehow to build trust in the leaders and a strong group allegiance to the project. As the participants become involved in the project emotionally it is necessary to use affective as well as instrumental motivators (see below for a more structured analysis of motivational effects).

⁷⁴ See the discussion about leadership and in particular the reference to the work of Bate (1994).

⁷⁵ These were set out in Chapter Five.

The need to recognise the importance of developing positive inter-personal contacts and building good relationships with the groups became evident after the first series of UK Study Visits in January 1998. This was highlighted with one particular group who had the expectation that I personally would be working with them for the 10 days of their visit to England. This was the only all-female subject group and it was not until the 4th day of their visit that I actually made contact with them. They did not tell me directly that they were disappointed that I was not working with the Group for their entire stay. However, I did hear of this shortly afterwards. This led me to re-examine my role as leader and the importance of developing the social networks in order to build better understanding and maximise the training being delivered.



Figure 29 Applause for a Group Presentation during a Plenary session in Miętne, where most of our training took place in a purpose built residential college.

This is neatly summed up by Wedel (1986), quoted in Clyne (1994) who said that "Poles use social networks to solve their everyday problems, to accomplish day-to-day tasks, ranging from buying batteries to resolving bureaucratic impasses, to bailing out arrested friends or family members. Clyne continues ... *'almost all successful business relationships were based on personal ones. There was a verb 'załatawić' which means 'to arrange, settle, wrangle', which expresses the Polish way of achieving this'* (Clyne 1994, p179).

I learnt my lesson quickly from this experience and made it clear to the Polish groups when I would be with them and when it would not be possible and the reasons for that. In addition, I made certain that three or four key members of my

team from the AEB were identified as those who would be working closely with the Polish groups when I could not be available. This was particularly valuable when Subject Groups spent Saturday and Sunday on cultural excursions.



Figure 30 Each Group was asked to prepare a toast to each of the other groups celebrating their unique contribution to the Project. The Mathematics Group used the definition of π as the basis of its toasts.

This then became a strong feature of the Study Visits to the UK and the term '*kwoka*' meaning 'mother-hen' was used to describe the relationship between the English mentor and guide and the Polish group. I also misread the situation regarding the need to show respect for the visitors. I had assumed that I did not need to show a great deal of personal interest in their visit. In fact, I did not understand that the groups expected out of courtesy and politeness that I would be closely involved with them⁷⁶. I had interpreted this wrongly. My view was that their expectation that I would be closely involved with the visits stemmed from the strangeness of them being in a Western European environment and also (some of them) their lack of ability to communicate adequately in English. This view was wrong.

⁷⁶ Indeed consultants from the UK who paid personal independent visits were overwhelmed with personal attention and kindness by their Polish colleagues.

However, the groups had developed a strong collective identity and spirit and enjoyed each other's company and wished to move around as a group rather than as individual, independent visitors. Another feature was the way in which they readily agreed to share accommodation (same sex of course) when we had limited facilities and they shared twin-bedded rooms. I initially thought this might be a problem but, in fact, I did not hear of any occasion when anybody either directly or indirectly objected. Indeed some said it was the highlight of their experience to be able to share a room with their (now) friend and often there were late night sessions with the whole group in one room.



Figure 31 For one of our social events, each regional group gave a presentation in song and verse about their region. This trio from the Łomża group followed this with a tasting of their regional delicacies.

Another important factor in team building, which was valuable in developing a mutual understanding between all participants, resulted from the various social and cultural activities which I planned with the Executive Group. We agreed that every Friday and Saturday evening at 8.00 pm there would be a "surprise". Each nationality took turns to organise these evenings. The evening meetings were prepared by a particular group and consisted of various events, including regional presentations of songs, food and drink, competitions, a Treasure Hunt, musical folk evenings, cabaret, dances, we celebrated with a Polish Christmas Eve dinner in late December.

Of particular interest in organising the first “surprises” was the reluctance of many of the ladies to join in. I wondered for example if this was a cultural effect. I wanted for very good reasons at the beginning of the Project to mix the groups so that participants could meet others from other subjects and regions. I invited or rather instructed them to form groups so that each subject was represented in its membership. In the end because participants stuck firmly to their chairs and did not move into groups which was my expectation (these being mature senior teachers and administrators), I had to go to those reluctant people and asked each to go to a particular embryonic group. Ultimately we succeeded and groups were formed and by the end of the evening we had broken the barriers and made it more likely to integrate the whole group.

A measure of this degree of integration occurred when we were in Arnhem, Holland during the final Study visits. We had been to Utrecht for a series of visits to schools and colleges. One or two people had intimated that they did not wish to return to Arnhem as they wanted to visit the city, in the afternoon and evening. I asked how many wanted to stay and a group of 10 elected to stay. Later on we met in a café and I asked whether they would like to taste Dutch Jenever. I ordered three different styles and we passed the “communion” glasses around the group each taking a sip. I took that to be a symbol of the strength of our integration as a team.

Within the Executive Group, which met regularly, in UK and in Poland in addition to meeting during the 10 workshop sessions in Poland, there grew to be a strong bond of fellowship. We ate together and worked closely meeting in 3s and 4s as needed to plan the project programme and, in addition, the Polish Co-ordinator and his Deputy and I meet at ICE meetings. Following an incident where a misunderstanding (of which there were many) could have resulted in severe breakdown of confidence and trust,⁷⁷ we invented a group name: Jan Smart and a toast in Polish ***“Duch Jana jest zawsze z nami”!***⁷⁸

⁷⁷ During a meeting in Warsaw we had asked a colleague to book the Executive Group into a good restaurant for dinner. When the Dutch and English EU part of the Executive group arrived at the restaurant there was no table booked under the name of any of our Polish colleagues. After an hour of phoning around and searching local restaurants, I found the Polish part of the group. It transpired that not only had the wrong restaurant been booked, but the name for the booking was mine! Thereafter we decided that we would use a collective common name: Jan Smart.

⁷⁸ “The spirit of Jan is always here!”

Also the newspaper became a very interesting way of team building as it contained articles about project personalities, their experiences, personal statements of the participants as well as some kind of poems, jokes and announcements. (See Appendix A).

The following comments give an indication of the spirit and impact of these activities.

Our discussions are very creative, no-one tries to dominate the group or impose his own thinking. Everyone can express his own opinion (Biology Group).

The atmosphere is very good...We work as a real team. Everyone has a chance to contribute and show his own experience (Modern Languages Group).

There is a good conversation in the group. Everyone has a right to express his own opinion and everyone listens to it. We really want it (Polish Language Group).

The expert creates a good atmosphere. He does not impose his views. He shows a certain issue really rationally and encourages the discussion (Modern Languages Group).

6.2 The danger of taking good practice for granted

One group was led by an experienced colleague from another organisation. I attended an early, but not the first, session of the group. After the first half of the morning session, I gathered that the Group which had met for the first time the previous day did not understand the role of the EU Consultant (identified here as Brian). I asked Brian to try to obtain information about the group, their names, addresses or job description or post. As far as I could tell, the team building or group building process had not been undertaken. I had taken-for-granted that Brian, in this case had started with some form of “ice-breaker” and had begun to develop a sense of team-working.



Figure 32 The eight Dutch consultants are joined by one of the AEB consultants who could speak Dutch (!) for their contribution (*Tulpen uit Amsterdam*) to an evening of sharing each others songs. The AEB used its Scottish representative to teach *Auld Lang Syne* and the Poles taught us *Szła Dzieweczka*.

I had not seen fit to ensure that, for example, part of the formal instructions to Polish group leaders or EU consultants was to establish a group identity, for example by a process of introducing everybody to each other with background information, completing a form which gives important personal information. The situation is made more difficult when a new member joins at a later stage and the group does not assimilate that person or even more pointedly when somebody like an EU consultant joins the group after it had met for one day and either assumes the group building had taken place or was not invited to become part of the group by identifying his or her purpose and background. It is quite amazing since this incident how many times I have observed, trainers, both in mono-cultural and multi-cultural situations ignoring these aspects of group development.

It was clear in the case of this group that they did not understand why the EU Consultant was there, his role, his background and his contribution. I had taken for granted that the leaders of the Groups (ie Polish people) and the EU Consultants understood the requirements for team building and group development, when in fact I am sure that they did not. This was why it had taken some groups a very long time to achieve any meaningful progress, because they were uncertain about how to work as a group.

One of the fallback positions when a group was in that position was that they did what they know and either this resulted in people saying "This was how I do it" or saying why they could not achieve the goals that were set as opposed to identifying where the needs were and then structuring a menu of input requirements which could be supplied by either Polish or EU Consultants or, of course, by a Study Visit. In my situation I arranged the first series of Study Visits without doing a needs analysis and only on the second visits did I do a needs analysis which proved to be extremely satisfying for the visitors as these needs were met in full whereas in the first Study Visit I could only guess at what was required.

Our relationships have much improved during this visit (July 1998)...Of course we speak also better English. The first visit gave us an image about the structure of activity, the second one showed us its content (Geography Group).

We must also treat as problematic the reasons why participants in a project wish to become involved. Of course they have different rationales. Some will work because of the intrinsic interest, others because of a commitment to national achievement, some to further their career, others because this was a personal favour or because one was called in. The sections below owe much to the Evaluators' work. All the quotations are from the Evaluators' Final Report.

6.3 Participants have different agendas

What were the underlying reasons for participants wishing to become involved in SMART? For many, they were motivated by their desire to play a role in the future national examination structure. However, at the beginning of SMART this role had not been clearly defined:

I would like to know very soon my future professional role. (Administration Group).⁷⁹

Gradually, step by step, individuals realised that they could or should play a part in the new system:

I bank on being a member of one of the Regional Examining Commissions - (Physics Group, May 1998).

The commitment of the participants was not consistent but fluctuated during the course of the SMART Project. It was influenced by various internal and external factors.

At the beginning of the Project, teachers who had been accepted as part of the project were convinced that their activity in the Project would enhance their professional career. Many participants stated that being involved with SMART02 had increased their '*unstated professional aspiration*' (November 1999). Others stated that their commitment to the Project was because of the unique opportunity that there was for professional development. However, these optimistic opinions which fuelled this view were sometimes accompanied by anxiety and sometimes by scepticism. A member of the Physics Group formulated his doubts in the following way:

It may happen that the Project aims will be ultimately realised by a quite different group of people. It may appear that we will be only an instrument for creating new solutions, and at a certain moment we will be given up" (December 1997).

Dealing with changes in attitude during the course of a project

At the beginning of the Project the general level of motivation was very high.

Many people had engaged themselves very much and had devoted much time to it (Administrative Group).

⁷⁹ All italicised quotations are from the Final Evaluation Report (1999).



Figure 33 In March 1998, half of the Administrative Group paid a Study Visit to The Associated Examining Board. Here they are discussing methods of despatching examination question papers to schools using secure postal services.

This view was supported by the Subject groups' work and a good team spirit:

I did not expect to work so intensively in a group. We work very hard and it was useful work (Biology Group, December 1997).

Moreover, the participants were convinced about the real and lasting significance of their work. According to them:

The operation will bring about fruitful results in the future (Physics Group, December 1997).

Everyone can contribute and present his own experience. (Polish Language Group, December 1997).

Additionally, there was another important factor which must be taken into account when analysing the attitudes within the Subject Groups. This was the acceptance in law by the national government of the New Matura examination in the Polish system of educational reform. This had the effect of intensifying the participants' commitment and engaged them in thinking about the realities of their

own situation and their futures. It should be noted that although the New Matura was conceived in 1994, and there were assumptions that it would become a reality, until the law was enacted, there was no real basis for believing anything would change.

So many hopes had been dashed in the past, so many reforms had been like water poured into the sand. There was a pervasive feeling that the entire reform programme could be cancelled at a stroke, depending upon who had political power (within a government comprising a complex coalition of many parties). So many senior politicians had come and gone that few participants had the feeling that there was anything in the reform programme that was stable. History had shown that patient hope usually was a victim to experience.

At the beginning participants' motivation was intrinsic, later they realised that the Project would result in opportunities for career advancement. This increased their commitment and engaged them in thinking about their own roles in the future.

6.5 Sources of stress and anxiety

On the other hand, the poor logistical support in the SMART Project negatively affected the level of motivation. Many participants very convincingly expressed their expectations in this field:

If it would be possible to send us the materials before a meeting...we could read them and come better prepared" (December 1997).

The lack of technical equipment was really very stressful for the Subject Groups' members, especially in the phase of preparing for the Pilot Examinations, as well as directly after this. There was a problem with the analyses of Pilot examination results:

The distinct barrier was a technical one (Physics Group, December 1997);

What about a pilot ... we were ready, but there were the worst technical problems ... Unfortunately we did not get help (History Group, June 1998).

In the second half of 1998 the 02 Component participants became increasingly anxious about the future. They expressed their conviction that they were really engaged in the work but they simultaneously formulated a question:

If what we do will be of any use (Chemistry Group, June 1998).

Many teachers continued to think about their future role but their approach was not so optimistic:

We had not got concrete information about what will happen in two years' time (Physics Group, June 1998).

Increasingly, participants expressed their need for assurance that they would be employed in the Examining Commissions after SMART was finished.

A critical factor affecting motivation occurred in December 1998 when the Ministry of Education made a number of major decisions regarding its educational reform programme. At this time, participants of the Subject Groups and the Administrative Group started to express their feelings of not being informed, frustrated, ignored and even excluded. They made many critical comments about those in MEN and talked about their anxiety resulting from the lack of information as well as the lack of co-ordination between MEN activity and the SMART Project.

According to participants:

SMART should coexist and should not be in contradiction (Geography Group, December 1998).

The biggest anxiety was the lack of coherence between the direction taken by the MEN proposals and those formulated in SMART.

SMART works for itself and the Ministry for itself – (ibid.)

This had a demotivating effect and caused general discouragement and a temporary loss of impetus for Subject Groups. A major fear was realised when the MEN issued its proposal for the staffing of the Central and Regional Examining Commissions. At the beginning most participants were not selected to be employed in the new institutions, although at later stages more were employed as the institutions began to take shape and grow. This led to participants experiencing increasing anxiety and frustration over their work in the project.



Figure 34 The Director of the Central Examining Commission (top centre) and the directors of the Regional Examining Commissions on a study visit to the AEB at the end of the Project in May 1999. No one on this visit had been involved with SMART project prior to their appointment. A cause of justifiable disappointment to many participants on SMART02.

Information about who were to be employed as the Directors for some of the Examining Commissions shocked everyone, people thought it was ridiculous when they were told that selected⁸⁰ people were professionally prepared for it – (Physics Group).

⁸⁰ They mean that those selected had had no exposure to training in the Nowa Matura, TERM nor SMART projects.

A summary of the discussion above is given in the following table.

Motivators ⁸¹	SMART Project Activity and Results ⁸²
Achievement	Professional development through SMART marked out participants as experts and leaders in their own regions. Many developed a training function. Setting realistic goals at the outset and monitoring performance and recording it in monthly reports to the ICE ⁸³ and Quarterly Reports to the PMU and MEN.
Advancement	Knowledge and expertise gained through SMART activities gave the opportunities to develop local solutions working in kuratoria or WOMs on curriculum and assessment issues. The study visits to UK gave unparalleled opportunities for contacts, networking, especially attending Subject Association conferences in UK and for some international meetings. Many hoped to, and some did, become staff on the Central Examining Commission and Regional Examining Commissions.
Recognition	Regional involvement in additional reform programmes locally. National recognition in publications which were disseminated widely. Leaders of Groups represented their subject at international symposia. Subject conferences were held with representatives from all Polish Universities.
Growth	In understanding and skills. Demonstrated by preparation of assessment material themselves and articles about the work. Names published widely to colleagues in LEAs (Kuratoria), and schools.
Responsibility	Group Leaders had more responsibility than members ⁸⁴ but the groups became very democratic and shared this. In own regions participants became responsible for disseminating SMART ideas and acting as trainers
The work itself	Of course this was a learning environment. The work was novel, challenging, innovating, of national and even international importance, intrinsically rewarding.

Table 7 Motivating factors for SMART02 participants

⁸¹ Adapted from Herzberg (1966).
⁸² See also Appendix B for a Table detailing generalised activities and achievements.
⁸³ ICE was the Inter-Component Executive which comprised the Polish Leaders and Deputies and EU leaders (known as Task Force Leaders), Evaluators of all 4 Components plus Polish MEN and PMU. ICE met monthly in the Warsaw office of SMART.
⁸⁴ See later Section (What lessons were learned).

6.6 Treating communication as problematic

The dynamics of communication involved three aspects:

- between the Polish participants and EU consultants;
- within a particular group;
- between Subject Groups, Leaders of the Project and with MEN.

At the start of the Project, there were different levels of understanding within the Subject Groups about examination issues. This was problematic as each individual within the group had had different experiences of working with the Nowa Matura (or in TERM). Some groups had people who had no previous experience or knowledge about the Nowa Matura at all. Each group comprised Polish subject experts, a Polish university consultant, a Polish Group Leader, a Dutch and an English Assessment and Subject expert.⁸⁵

Working with EU consultants and facing complex and demanding issues connected with examination procedures raised many problems. These problems were exacerbated both by the considerable differences between the Dutch and English⁸⁶ political, educational, administrative and cultural contexts as well as by the linguistic problems.

The terminology used in the presentations by the EU consultants, although directly translated from English into Polish, provoked many difficulties, questions, misunderstandings and controversies. The situation was complicated by the considerable variation in English language skills among the Polish participants and EU consultants' lack of ability to speak Polish.

At the beginning of the Project, the language barrier was seen to be a critical obstacle to progress. One of the Physics Group members expressed it in the following way in the Autumn 1998:

⁸⁵ The Dutch consultants (employees of CITO) were responsible for the external assessment component, the English consultants (full-time staff from AEB and senior examiners) for the internal (teacher assessed) component.

⁸⁶ The reason for involving Dutch and English consultants was to provide a range of experiences for the Poles to evaluate.

There are certain problems when we want to engage our expert directly into the inner group discussion. There is an obvious reason for it - he would listen to us for half an hour and understands nothing. And when one of the English speaking participants will summarise a content of the discussion, for him, other people do not understand it.

The member of the Polish language group made another comment:

It is very important to put these interesting and useful ideas into the Polish tradition; it cannot be rejected.

Figure 35 John Francis, Peter Stanbrook, John Comerford and Sian Moore, AEB consultants in Zakopane in the Tatra Mountains for workshops in December 1998.

(Photo by Henryk Szaleniec)

The EU consultants expressed similar feelings about the situation:

I think that I contribute to the Project... of course I can only describe what we have done in Holland and how it is being done in Great Britain (Dutch expert).

They (participants) always have their own opinion and feelings on every subject. They never accept things mechanically (Dutch expert).

It became obvious after a particularly disastrous occasion that the project needed a working *Glossary and Dictionary* of the “terms-of art”. The incident which provoked this was a confusion which occupied about 4 hours of training over the meaning of the word “Centre” as used by two consultants from the AEB working with the Administrative Group. This word in the cultural context of the UK examining boards means a school or college registered to take examinations,. The Poles understood this word to mean an Examining Centre, such a Regional Examining Commission. It was not until I sat in on the end of the morning session of training I realised the confusion. Partly because I understood by then a little Polish and could detect the discomfort of the participants.

KATALOG ZADAŃ
MATURA (Standard Spisochwider)
200..... (okres projektowy - stary ułamek)

TERMIN	ZADANIE	WYKONANY	KOMENTARZ
od III '98	① OPRAWIANIE PODSTAW PRAWNYCH*	nie ma brzoje NH MEN	* PROBLEM: procedury legislacyjne
od III '98	② PRZYGOTOWANIE PROJEKTÓW NIMAGAN EGZAMINACYJNYCH* "SYLABUSÓW"	POKAZANE GŁĘBOKI PRZEDPOKŁAD NH SHART	* SYLABUSY języku unijnej nadawczy i wersje dla odbi z deficytami
OSTATECZNY TERMIN IX '98 ... III '99*	③ POWOŁANIE CAE i ROE*	MEN	a) umocowanie prawne ROE ??? b) okres rozmiaru c) finansowanie zadani z uwzględnieniem publikacji
III '99	④ ZATWIERDZENIE SYLAB... POWOŁANIE GK EGZAMINATORÓW	CAE	
od VI '99	⑤ URUCHOMIENIE SZKOLEŃ: - egzaminatorów kontaktowych - nauczycieli - organizatorów egzaminu	ROE + WOM-y	
od VI '99... do 31 VII '99	⑥ URUCHOMIENIE PROCEDUR: - PROMOCJI "SYLABUSÓW" - DRUKU "SYLAB..." - DYSTRYBUCJI "SYLAB..."	ROE	*

UNAGA!!! DO WSZYSTKICH ZADAŃ TRZEBĄ OPRACOWAĆ INSTRUKCJE OPRAZ OSZACOWAĆ KOSZTY

Figure 36 We made good use of flipcharts, not only to record progress but also because they greatly assisted in overcoming language communication problems.

Thereafter, we began to use technical terms more circumspectly. Using pictures, communicating through writing on flipcharts became important. We also developed a technical glossary and dictionary to clarify terms for future use in the dissemination phase. But above all the common language enabled the different groups to work to a common purpose and establish a common identity

In the words of the Evaluation Report⁸⁷

In the Spring of 1998 the enormous engagement of the participants and Western experts resulted in elaborating a common language. This became an instrument of both strictly professional work as well as group integration, including the EU experts.

6.7 Sustaining direction through positive management⁸⁸

The leadership of SMART02 were able to communicate a compelling vision of the project. The participants became an identifiable organism which shared clear goals. The vision had inspiration and although lacking in clarity at times because of poor ministerial direction, there was a clear aim for the work. The motivation was sustained well by various strategies. We were able to provide a strong persuasive driving force for success and through creating "original events, legends and stories", we built a positive climate of trust in which the work was undertaken. By addressing the affective needs of participants we provided the right psychological and social support which could survive the tough times and working together as a team - win.

6.8 Ethical implications of methodology

As Task Force Leader of SMART02 and Action Researcher for the Dprof study, I was fully integrated in the project as participant observer. My objectivity was secured through the multiple client support⁸⁹ - from participants, co-workers and the external group of Evaluators.

⁸⁷ This quote is from the English language version of the Report and is quoted verbatim.

⁸⁸ "The capacity to bring about change and the capacity to bring about improvement are two different matters. Change is everywhere, progress is not" (Fullan 1991, p.345).

⁸⁹ see Gill and Johnson (1997), p.75.

Not only were Evaluators findings useful to corroborate my own but also their research methodology for data collection was complementary. This study has also been read by two Polish co-workers who have commented on the accuracy of both factual and interpretational (subjective) aspects. Because there is a possibility that some participants may read this work, or that other papers might emerge from this, I have had to suppress some observations which I could have made. This is a study where some participants can identify themselves or be identified by others.

The reason for not including this material is that specific references to participants behaviour might be construed as being either overly or unfairly critical to participants. Anyone familiar with the identity of the researcher in this study could identify the participants "to their possible detriment" (ibid.). Indeed because of the very nature of the Dprof, it is almost impossible to remove the personal aspects and hence there is a greater danger of revealing identifies that in other kinds of research would be hidden. The answer to this dilemma could be to restrict the readership of the work to assessors only. However, this is not an option in my case, as project participants know that this work is being undertaken and have already expressed an interest in reading some or all of it when it is finished.

CHAPTER SEVEN

What lessons were learned?

Are there rules and guidance derived from this study which might guide others engaged in similar⁹⁰ pursuits? In this study I have referred to texts on the management of change, texts on inter-cultural differences, and texts on communication issues. There are of course many texts which give “tips for trainers” see Race and Smith (1995) and these may be applicable to many contexts. Here I want to examine the inter-cultural aspects of managing change. Can what I learned through this study during my experience in Poland be generalised to other inter-cultural change situations.

I will deal with four issues which I believe need to be addressed in any inter-cultural programme of managing change. They are: **Developmental, Communication, Organisational, and Social Issues.**

7.1 Developmental Issues

Relationships between Consultants and Participants

Consultants are providing expertise and experience (in a sense they are “donors”). Those on the project who are on the receiving end of the advice and guidance (whom I have called in this study, “participants”) are the “receivers”. The relationship between “donor” and “receivers” is a delicate one and needs to be managed sensitively. There is a trap which is easy to fall into: the donors can be perceived (often by themselves) as having superior financial and psychological control in the project and therefore be in a more powerful position than the receivers⁹¹.

⁹⁰ I am referring to substantial inter-cultural projects. The SMART02 project required sustained commitment over a 27 months with preliminary activities lasting 18 months prior to the contract being signed.

⁹¹ This was the case in one project known to me, where, although it was actually contrary to the law of the country the government ministry responsible for administering the project was given the choice of taking illegal action by the donor organisation or losing access to the funds.

This is exacerbated where there is a difference in standard of living between the donors and the receivers. This can create an imbalance in the relationship and lead to potential conflict.

In turn, the situation may be compounded by the natural polite and friendly attitude towards visiting consultants: treated as welcomed guests. They are offered generous hospitality and their wishes deferred to. The visiting consultants might gather the impression that as 'expert consultants' they have an eager and co-operative audience. But at this initial stage in the project, it will be difficult to know whether anything you have said, presented or done, is really accepted. You will only know whether you have been effective when you see your ideas owned, transformed and re-presented by the participants. It is necessary to develop trust between participants and consultants, through patiently building up an understanding of the context, aspirations, background and motivations of the key decision makers involved in order that there is honesty and transparency in the transactions. Language difficulties interacting with cultural differences in conducting discussions compound efforts to do this.

Discussions need to be sensitively managed, in order to give all an opportunity to express their views. In SMART02, I encouraged the EU consultants⁹² to be patient when the discussion was in English and allow time for Polish native speakers who were not sufficiently fluent enough to make their contribution⁹³. It was important to allow Polish colleagues to develop their arguments (speaking in Polish) and explore potential solutions amongst themselves before presenting their views (through an interpreter) for consideration by the whole group.

Developing shared project leadership

To mitigate against the possibility of unequal power between donors and receivers, joint leadership needs to be developed at the outset of the project. In SMART02 we developed a consortium of equal partners representing potential consultants and potential participants some months prior to bidding for the SMART02 contract. We actively worked to create a harmonious, supportive atmosphere in which there was

⁹² Dutch and English.

⁹³ Otherwise the debate would be between English and Dutch or Scottish consultants and the Poles were excluded.

mutual respect for each others' different and complementary views, expertise and abilities.



Figure 37 The representatives drawn from the Warsaw region entertain the others in song during one of the evening events.

Making time for informal meetings and social exchange between the key personnel is essential to develop trust and tolerance, the precursors to respect.⁹⁴

Building a strong shared ethos and spirit

The role of the leader is to build a positive and supportive spirit using a variety of group activities. Nurturing the spirit can be done by bringing together different aspects of the various cultures represented in the project. Ways of doing this have been described in Chapter Six. One significant aid in achieving this spirit is to use what Francis (1987) calls "useful geography" "*Local geography greatly influences communication patterns*" (and as I have pointed out good communication is the key to successful inter-cultural project management). The choice of an appropriately equipped training venue; its facilities, the size of rooms for meetings, (for example

⁹⁴ Almost requires going beyond strictly work scheduled activities. One of the key catalysts was Dutch, English and Polish Leaders and other consultants and participants exchanging hospitality in each others' homes.

space to hold social activities is essential⁹⁵) the very layout of the training complex, access to bedrooms and dining facilities affect the development of the group ethos.

Build and keep building the team

This is axiomatic in any culture. In inter-cultural situations the donor manager is not necessarily in control of selecting nor managing “locally” recruited participants. Expectations might differ between leaders from the different cultures regarding the calibre and motivation of participants. A particular difficulty is in dealing with late-comers to the project. It is easy to take-for-granted, because they may not be your responsibility, that they have been briefed and that they understand their role and the background to the work.

One problem concerns “important” visitors who arrive during workshops, often unannounced. They can upset the programme and atmosphere by wandering in and out of sessions, taking part, offering “deviant” opinions⁹⁶. Visitors to SMART02, especially civil servants and politicians from MEN tended to “butt in” and request (not to be denied) time to give an irrelevant speech to demonstrate their presence and importance.

In small work groups it is important to establish a group identity, for example by a process of introducing everybody to each other with background information, completing a form which gives important personal information, to understand that reasons for participating are varied, to understand why the participants and consultant are there, their role, their professional background and their contribution.

⁹⁵ One of the most unsuccessful 4 day workshops was held in a rural and remote place where there was no possibility of holding a whole group event, there was no bar and nothing in the way of entertainment. This only happened once.

⁹⁶ One of the most disruptive events occurred when one of the participants invited a senior academic from a similar project in an eastern European country to our workshops. He settled himself into a group and proceeded to offer quite different views about examinations from those being espoused by the consultants. A member of the group told me they were divided into those who supported the consultants’ views and those who supported his. I was obliged to remove him tactfully from the group before the group was irrevocably split.

Agree a common language

A common language enables the groups to work to a common purpose and establish a common identity. This is necessary from the beginning and needs to be checked out continually. Using pictures and diagrams, communicating through writing on flipcharts is advised; as is developing a *technical glossary and dictionary* to clarify technical terms.

There is no need for a lot of oral input by consultants if the material can be given in writing, preferably in the host country's language. It is worth noting that the main purpose is that the participants learn, not that the consultants 'teach'. The more effort that is put into preparation, particularly into host country language, the less need there is for 'stand and deliver' techniques. Where both the donor and receiver languages are being used it is important to use dual language version of handouts and overhead slides.

Programme planning and evaluation

A small representative Executive Group of leaders, consultants and participants should:

- plan the programme in detail;
- continually monitor progress and identify weaknesses;
- pay attention as much to the technical aspects as the social and inter-personal aspects through **team building** exercises;
- ensure that the small work-groups report back regularly in writing and orally to the whole group;
- generate ways in which everyone knows what is going on, using a variety of methods⁹⁷.

It is also useful for the Executive Group to meet before each workshop with the leaders of the smaller groups to help to achieve the above.

⁹⁷

We created a project newspaper to share news and views (see Appendix A: SMARTGazeta).

Open feedback and evaluation is essential. Plenary sessions, at the start and finish of workshops, should be used to provide everybody with an opportunity to raise questions and make comments. If possible, there should be some external, independent evaluation of the work.

In SMART02 we invited representatives of the stakeholders in the project, for example ministers and civil servants and senior staff from the universities, to attend workshops and contribute to them in a critically positive way⁹⁸.



Figure 38 Some members of the group of newly appointed senior staff of the Central Examining Commission and Regional Examining Commissions enjoying an English pub lunch during their study visit in May 1999. Some meals were provided others were bought by participants out of their daily allowances.

Money and differentials in earning power

During the course of the project there were significant movements in exchange rates. The SMART02 project was costed in ecus (later in euros). Almost

⁹⁸ Clarify your understanding of situations by obtaining independent views of contentious issues. Politeness can get in the way of veracity. A critical friend, who is prepared to tell you the truth, is worthy of trust.

immediately the contract was signed the ecu began falling against the Pound sterling. There was no provision for this and about 15% of the value of the project was lost.

With the UK economy amongst one of the strongest in the world and the Pound Sterling increasingly strengthening against other currencies, there were exchange rate problems for visitors to the UK. Within the budget for study visits in SMART02 there was provision to give visitors a reasonable daily sum in Sterling as unaccountable spending money. Whether the visitors saved it and used it to supplement their relatively low salaries, spend it on meals and trips, or bought household items and presents for their family was their decision.

UK consultants benefited from the reverse situation with sterling buying an increasing value of local currency. I had fixed a daily rate to be paid in local currency to cover expenses of consultants' board and travel in Poland. This rate seemed reasonably generous at first but as the value of the pound sterling against the Polish złoty doubled over the period of the project we recouped some of our losses from the declining ecu! It was important that the EU Consultants paid their way and made sure that they did not abuse the generous hospitality of their Polish hosts⁹⁹

7.2 Communication Issues

Working in two or more languages brings problems. As we have seen communication is a critical feature of inter-cultural change programmes. Language transmits culture, feelings and attitudes. I present some aspects for consideration. For SMART02, the project language was English, but not all participants were competent enough for this to be realistic.

⁹⁹ If there was a collection to buy drinks for an evening social event, then the EU consultants were asked by me to put in the equivalent in economic value to the Poles which would represent 5 to 10 times more in actual value.

There was extensive language tuition which some participants ignored.¹⁰⁰

Use Global English

Participants will have learnt a formal version of English. It will not be colloquial. The use of everyday English which would be entirely natural in the UK can be quite opaque to second language speakers. Our use of metaphors and allusions, slang and idioms usually confuses and bewilders even quite competent speakers of English as a Foreign Language (EFL). Global English is English shorn of pictures etc. It uses short active-verb sentences, no parentheses. There is a distinct skill in making oral presentations understandable to speakers of EFL.

Figure 39 Simon Eason, AEB Statistics and Computing Officer, shows how AEB archives its examination records. (Photo by Ilona Goryńska)

Preparation of materials

Organise in advance the production of *dual language* materials, overhead projector slides, handouts, to encourage the development of English Language skills of the participants. It is advisable to use visual material, video, written handouts,

¹⁰⁰ The reason given that they did not have enough time.

diagrams. In particular, in group work the use of flipcharts is preferred: to chronicle the development of thinking and the resolution of problems; to use these in a way so that they could be photographed or taken away, and transcribed into records or actual materials, useful to the Project. Having a clear definition of terminology and specialist jargon and, at a very early stage developing a glossary of terms/dictionary, will be a major advantage.

Problems with Presentations

Giving presentations to a large group does cause particular difficulties for consultants from a different culture and using a language different from the participants. The feedback from the participants is less easy to interpret and your effectiveness less easy to gauge. Generally, as a visiting consultant you will be listened to with quiet politeness. But, for example, if the chatter from the group becomes more intrusive, one of the following is happening. You have said something which contradicts what the participants have been told previously, or what they know, or what is written in their notes. Or you have said something which triggers off an issue about which you have no understanding but which is very relevant in the local situation. Or you have started an idea which is worthy of consideration and of independent discussion.

One of the things you should not do is to raise your voice and talk over it or stop the discussion or treat it as an interruption. The preferred technique is to stop, ask the interpreter what they are saying. Check out what is the most appropriate action which may be to make a note of it and return to the point at a later date. It may be advisable to stop completely and turn to the issue and let it be completely debated in the host language and a summary of the discussion reported to you so that you know if any conclusions have been arrived at or if any action is required.

Begin to learn the local language

In order to empathise with participants' difficulties, and to understand what efforts are required by them to learn your language, you should attempt to begin to learn theirs. In SMART02 only 3 consultants out of 30 made this attempt. Those that did

begin to learn Polish were rewarded by a much greater degree of warmth and friendship and understanding. The other rewards were that we were better able to monitor what was happening and gain understanding denied to other consultants.

7.3 Organisational Issues

Report and publish, record¹⁰¹ and list

Whatever the contract requirements are for reporting, there will be nothing lost in keeping detailed records of all meetings, decisions, thinking, examples of work, illustrative material, diagrams and photographs. This is particularly important when the main outcome is a cohort of trained participants. It is easy to state that “these people have been trained”, not so easy to evidence this. Certainly, at a later stage the “trained” participants will come back after the contract is ended and ask for the training material which you used. They will have lost it, given it away or they will have left their institution which retained it. The more that is chronicled and collated the better. The production of an *archive* of critical material is central to the process of training. Also, be aware of differences in requirements, scale and diversity demanded by national and local authorities, sponsors and donors as well as one’s own organisation.¹⁰²

Study Visits to UK

It is crucial to plan these well in advance in detail (but build-in scope for flexibility as numbers and requirements will change). Sometimes owing to political and domestic circumstances approval for participants travel overseas by the relevant government department may take a long time. There is a need to plan and budget for extra assistance and support, especially for interpreters. It could be more cost effective

¹⁰¹ Keep a daily log of everything significant in a hardbacked A4 ruled book, with date, place, those present, what happened. This is invaluable if you are receiving requests for the supply of information, particularly if you need to take down names and addresses. *In the end pages of this logbook, it may be useful to create one’s own glossary and dictionary by recording frequently used words and phrases, technical terms in the foreign language.* By using this technique I was able to follow, without difficulty, almost all the presentations given by the IT development Group in Wroclaw, as I insisted they made their presentations using the written word and as many of the technical terms in Polish were familiar by this stage.

¹⁰² Specially in the provision of original receipts etc.

to bring a native speaker as interpreter from the receiver country than to hire one from the UK¹⁰³.

Those organisations receiving the overseas visitors must be briefed explicitly on the background, objectives and activities required (see Appendix C for briefing document for hosts and exemplar Programme for Study Visit). Expect and plan for last minute changes and newcomers. A high level of support for participants will be repaid in the achievement of project objectives both instrumental and affective. It is sometimes essential to prepare two Study Visit programmes (one which is official for receiver country's authorities (ministry) and the actual programme delivered). An important aspect of the Study Visit is the presentation of *Certificates* showing the evidence of the training experience.

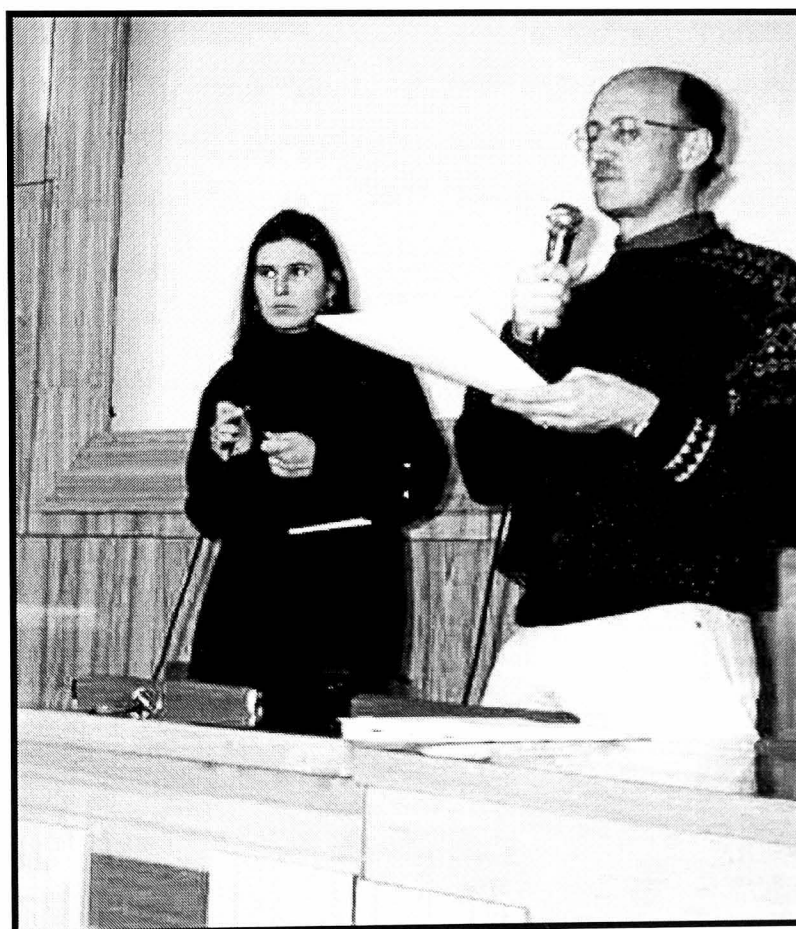


Figure 40 Peter Stanbrook, Head of Teacher Support Services, AEB, giving a presentation of dissemination systems with phrase-by-phrase interpretation by senior Interpreter, Ilona Goryńska.

¹⁰³ Usually, one can find a relative of one of the participants, a student, or a co-worker who would be content to experience a couple of weeks in the UK without cost and some pocket money in exchange for acting as group interpreter. The cost of paying for a "professional" interpreter from the UK, especially of an Eastern European language, is very high.

Organise systems for translation and interpreting

There must be rules for directing the translation and interpretation service. A clearing base¹⁰⁴ for translation of documents is required in order that there is control over the quality, quantity and nature of materials to be translated. A budget line for translation and interpretation should be monitored by project leaders.¹⁰⁵ A register of approved project translators will be helpful and someone appointed to monitor and edit materials produced by translators on the register. This is particularly important where documents are to be published officially.

Interpreting comes in a number of forms¹⁰⁶. During formal presentations, phrase by phrase interpretation is generally effective. Such a method does not usually come naturally to presenters and an appropriate technique needs to be learnt. It is necessary to gauge the calibre of English language skill of the interpreter in order to use the relevant level of Global English; to speak in sentences of appropriate length with pauses. If the same interpreters are used throughout the training period they will learn both the technical language and the peculiarities and idiosyncrasies of the style of delivery used by consultants. There needs to be an understanding and professional relationship between the interpreter and the presenter in order to agree how to conduct this important part of the work.

7.4 Social Issues

Cultural orientation before starting project

It is worth preparing consultants before they begin their work overseas for the different culture¹⁰⁷. They can be given some introduction to the language; (learn a few key survival phrases) and history; what to expect as food and drink, the courtesies and customs likely to be encountered; exchanging and sharing

¹⁰⁴ In SMART02, three of the leaders had authority to clear materials for translation. These were then passed on to the senior translator in Poland who commissioned the work locally.

¹⁰⁵ I had to deal firmly with more than one consultant who directly commissioned translation work undertaken in the UK which was five times more expensive than in Poland.

¹⁰⁶ 'Gist' translating often has to be undertaken partly at the fringes of the activity so as not to interfere with the business being transacted. This would be one-on-one interpretation when the consultant is the only person in the group who wishes to understand the transactions in his native language.

¹⁰⁷ This course should be given by a native.

hospitality, for example guidance on etiquette - greetings; shaking hands. Giving gifts needs sensitivity where large differentials exist between donors and receivers standard of living. Consultants should take time for sightseeing, shopping, going to the theatre, walking in the countryside and visits to cafes and pubs.



Figure 41 Dutch consultant Klaas Schreuder with the Polish Mother Tongue group enjoying a joke during one of the evening social events.

Social learning

An important part of developing team spirit is to organise social activities. These are particularly valuable when working with large groups during residential training workshops or study visits, especially if the training centre is remote from places of entertainment, bars etc. Where there are opportunities to provide in-house entertainment, these should be planned well in advance. All groups should be given the chance to plan an event in turn and of course take part.

There may be opportunities to celebrate successful completion of stages of the work programme. This could be, for example, on the completion of study visits overseas marked by the presentation of certificates recording the achievements of the group. At a less formal level, it is valuable to celebrate individual participants' birthdays or name days, feast days and holidays such as Christmas, Lent, New Year, and national holidays¹⁰⁸ and events.

¹⁰⁸ For example in SMART02, we marked the end of Matura examinations with the Matura Ball which we held each year in May.

Taking photographs of events, participants during workshops, social occasions, especially group photographs are important markers for creating team spirit. It is sensible to declare during an activity the point when group photographs will be taken and get in the habit of marking each significant event with informal and formal photographs. These should be both kept together as an official record of the project as well as copies distributed freely to everyone involved. There should be a budget line for this service.

7.5 About managing change in an inter-cultural context¹⁰⁹

In concluding this study, I summarise some of my findings about managing change¹¹⁰ in an inter-cultural environment. The change agent's reality is not necessarily shared by recipients. Your vision of what is needed is not going to match that required by the receiving body. You observe and evaluate the receiver's situation from the standpoint of your culture. They will implement change from the standpoint of theirs; according to their interpretation of requirements. There are undeclared and hidden personal and political agendas operating against a changing background about which you will have scant knowledge and less understanding.

Disagreements are essential to effect change. In the early stages of the project, participants may accept "imported" ideas from the donor but, soon comes rejection, and then co-operative development of fit-for-the-purpose solutions. In any case, it is only when the solutions come to be implemented that real understanding takes place.

After the project is completed, and the changes are ready to be implemented (possibly, within the new organisation), the former project participants who are by this stage implementing the new ideas or systems¹¹¹, realise that they only partially understood what the changes were about. They will request, at this stage, information and materials which although were provided as part of the training, have

¹⁰⁹ See Fullen (1991) for a fuller discussion of managing change in an educational context.

¹¹⁰ The assumptions we make about change are powerful and frequently subconscious sources of actions" p.105, *ibid*.

¹¹¹ In the case of SMART02, this was a training project and there was an intention to support the establishment of the new institutions (Central Examining Commission and Regional Examining Commissions).

been forgotten or lost or were ignored or rejected at the time. The problem here is that, if the project is complete, there is no resource to fund the continued support that is required. Change will only happen under pressure which is greater than the desire to stay in the same place, operating in the same way. This pressure creates the willingness to learn and motivates action. A spiral of understanding is an essential part of personal development. Experiences build on each other, theoretical knowledge is made sense through observation and hands-on experience. Learning experiences have to be repeated in different contexts and cultures. What is successful in one culture can not be transmitted into another with the expectation that it will be equally successful¹¹².



Figure 42 The market square, Wrocław. The office of the SMART02 Polish Co-ordinator was located not far from here.

¹¹² A mistake made frequently by politicians who visit “model” schools, prisons, hospitals in foreign countries and wish to import these best practices directly into their own culture.

Ownership of ideas and methods comes from adapting and creating these to meet the requirements of the “home” culture.

The rejection of change may be not because they do not like you or your ideas, your methods. It may be that there is a scarcity of resources, a political situation which counters the proposed changes¹¹³ and differences in attitudes. Good ideas can be unrealistic, expensive or non-implementable¹¹⁴. You can only expect the participants directly affected by the project to change. Cascading the training needs to be designed, costed and resourced. Planning for dissemination is critical to expanding the innovation. Change implementation is not dependent so much on technical knowledge, but on politics, resources, (particularly financial) and the status of those participants who are decision makers.

7.6 Reflecting on the Action Researcher's capability

I have set out to demonstrate in the context of a national project for implementing reform, the use of professional praxis at the highest level – dealing with a complex amalgam of methodologies and critically evaluating outcomes of management in a creative and positive way. This work has been undertaken in an inter-cultural environment which has brought particular issues to the fore and required unique solutions to resolve multi-level and interdisciplinary problems. The dynamics of managing change necessitated the application of professional capabilities in research and development and awareness to subscribe to high standards of moral and ethical behaviour.

My action, as manager of the SMART02 Project, resulted in an increased understanding of my professional capability. The experiential nature of my role as action researcher - fully involved in the Project has been critically and reflectively evaluated and chronicled in this study. The *process* of writing this work has shown me insights into my professional abilities and standing amongst my co-workers. It has re-energised and enhanced my own self-concept, and I trust that this study also

¹¹³ SMART02 was bedevilled by political influences. A general election with a change of government took place in the middle of the programme

¹¹⁴ In Moldova there was absolute governmental resistance to what was meant to be a generous offer of financial support for a project, because of political unacceptability.

will be a platform for further¹¹⁵ activity within my community of researchers and developers. It certainly has better equipped me to face the challenges of a new senior management role within a large organisation.¹¹⁶

¹¹⁵ There is scope for further work in this field. The economies of countries in eastern and central Europe, are developing rapidly. Inward investment by nationals and multi-nationals, such as Kodak, Daewoo and Nokia brings foreign management face-to-face with local labour. Korporowicz (1996) identified the issues involved. A suggestion for further work using this study as a platform would be to develop an assessment instrument to identify the skills which will enable a manager to successfully manage an inter-cultural project.

¹¹⁶ Head of Business Development in the Assessment and Qualifications Alliance (AQA).

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APPENDICES

- A SMARTGAZETA
- B Achieved Outputs of Sub-Groups
- C Study Visit Planning document – Objectives and Activities checklist
- D Study Visit Programme for Polish Mother Tongue Subject Group

Appendix A

SMARTGAZETA

Appendix B

MAIN COMPONENT'S TASKS COMPLETED AND OUTPUTS ACHIEVED

Prepared by John Francis

APPENDIX B

Main Component's tasks completed and outputs achieved

No	TASK Sub-component and name of group	Dates of activity	Brief description	Achieved outputs
1	Sub-Component 1 Executive Group Production of Dictionary	January 1998 - May 1999	Compilation of technical dictionary and glossary of education and assessment terminology	Dictionary and Glossary - Polish - English and English - Polish
2	Sub-Component 1 Executive Group Production of Catalogue	January 1998 - February 1998	Annotated (in Polish) collection of examination procedures, forms and operation material describing the procedures for the conduct of an examining board in the UK	Catalogue of examination materials - annotated in Polish
3	Sub-Component 1 Executive Group Production of Position Papers	September 1997 - May 1998	Discussion, drafting and editing of policy documents and executive summaries for submission to MoNE	Six published Position Papers
4	Sub-Component 1 Executive Group Study Visit to UK	January 1998	First hand experience of processing of examinations, relationship between education system, national curriculum and assessment in UK	Increased understanding of methods and procedures and technical aspects of the assessment of the curriculum, the work of examination boards and UK education systems.
5	Sub-Component 2a Subject Groups (8) Production of Examinations materials	June 1997 - May 1999	12 workshops to develop draft Syllabuses, Pilot examination Papers, Coursework specifications, Marking Schemes. Together with statistical analysis of results.	Published material for Eight subjects of Nowa Matura: Syllabuses, Pilot Examination Papers, Coursework Specifications, Marking Schemes. Pilot Test Results Reports.
6	Sub-Component 2a Subject Groups (8) 16 Study Visits to UK	September 1997 - October 1998	To initiate and develop a dialogue between Polish educationalists and UK colleagues in schools through visits to schools in the UK. To gain insight into the issues facing UK teachers and managers and how these are dealt with against the UK cultural, political and economic environment. To observe and interact with students in a teaching situation. To understand how the National Curriculum is interpreted and delivered in the UK context. To meet with examination staff and understand the processes and procedures involved and how examination materials are produced	Professional skills and understanding with respect to the overall aims of the SMART programme enhanced. Subject and methodological developments in subject in UK and Polish context understood. First-hand information about the issues surrounding the production of examination regulations, the administrative procedures and the relationship between the Board and its centres gained
7	Sub-Component 2b Monitoring of Performance Unit Study Visit to Scotland (SCRE)	December 1997	Course on the theory and practice of National Monitoring of educational performance through workshops, tasks and specialist seminars	Increased understanding of International methods and procedures and technical aspects of sampling, monitoring and test construction
8	Sub-Component 2b Monitoring of Performance Unit	December 1998 - March 1999	Complete Report of test production procedures arising from Pilot testing, refining and revising test materials and procedures	Final Reports

9	Sub Component 3 Administrative Kuratoria Group Study Visits	March 1998 and July 1998	Training through participation and active observation of Examination Administration	Understanding of Examination procedures in an operational environment
10	Sub Component 3 Administrative Kuratoria Group Training workshops	October 1998 -February 1999	Training workshops with EU experts for regional administrators developing understanding and skills for the Production of procedures, Timetables and Regulations for Pilot Nowa Matura and supporting material for cascade dissemination.	Timetables and Regulations for Pilot Nowa Matura and supporting material for cascade dissemination
11	Sub-Component 4. Data Processing and IT Production of Report	January - May 1999	Preparation through interactive workshop for developing Examination Data processing specifications.	Final Report (23pp)
12	Sub-Component 4. Data Processing and IT. Study Visit to UK	January 1999	Developing IT systems for Examining commissions	Training through discussion, demonstration, participation and active observation of Examination Computing systems
13	Sub component 1, 2a, 2b, 5, Executive Group, Representatives of Subject Groups, MPU and Evaluators Study Visit to CITO, Arnhem, The Netherlands.	April 1999	Contextualisation of training within Dutch educational and assessment system	Increased understanding of methods and procedures and technical aspects of the assessment of the curriculum, the work of examination boards and Dutch education systems.
14	Sub component 2a Seminars for subject groups with academic consultants from different Universities	December 1997 –May 1999	Complete Report of subject work	Final Report
15	SMART 01 - 04 ALL Component Seminar Reporting to MoNE	May 1999	Presentation of Outcomes of SMART	Report
16	Newly appointed heads of CKE departments Study visit to Guildford, AEB	May 1999	Contextualisation of training within British educational and assessment system	
17	All Sub- Components of 02 Final conference	May 1999	Results and Future activities	Plans

Appendix C

STUDY VISIT PLANNING DOCUMENT OBJECTIVES AND ACTIVITIES CHECKLIST

Prepared by John Francis

SMART - COMPONENT 02

STUDY VISITS BY POLISH DELEGATES TO UK

The objectives of the Study Visits are related to different activities

Social and Cultural Activities

Objectives

To gain understanding of some aspects of UK life and culture

To place in context observations, discussions and materials

To participate in and enjoy a variety of activities

Activities

Some free time will be available for self directed activities

Visits to museums, places of interest will be arranged

An opportunity to make a guided selection of books from Dillons will be on the programme

Examination Board Visit

Objectives

To observe the activities, processes and dynamics

To gain an understanding of the role, objectives, management, function, structure and culture of a large examining board

To establish contact with colleagues within relevant departments and set up a basis of exchange of ideas and materials

Activities

Presentations, discussions, inspection and selection of relevant examination material

School Visits

Objectives

To initiate and develop a dialogue between Polish educationalists and UK colleagues in schools through visits to schools in the UK

To gain insight into the issues facing UK teachers and managers and how these are dealt with against the UK cultural, political and economic environment

To observe and interact with students in a teaching situation

To understand how the National Curriculum is interpreted and delivered in the UK context

Notes

Polish educationalists have a wider responsibility than enhancing their own teaching performance. They have a responsibility for networking on behalf of Polish teachers and a responsibility for the overall objectives of the SMART programme

Activities

Presentation by Polish delegates to UK colleagues on the purpose of the visit, providing some information about the background to Polish education and political issues. Discussions with senior management team, governors, students.

Participation in lessons. Tour of orientation of school

Topics

How to deal with the National Curriculum
Organisation and structure of the teaching force.
Financial and logistical responsibilities
School management and governance
Curriculum assessment and planning issues.

Subject Association Conferences**Objective**

To enhance professional skills and understanding with respect to the overall aims of the SMART programme
To engage in dialogue on current issues in own subject
To initiate and develop a network of colleagues
To evaluate subject and methodological developments in subject in UK and Polish context.

Activities

Attending seminars
Engaging in discussion
Setting up short "special" workshops
Inspecting and purchasing appropriate educational, cultural and technical material
Taking part in social and cultural events

Dissemination**Objectives**

To prepare a report evaluating the degree to which objectives of the Study Visit have been achieved

Notes

The report would be used widely, at SMART workshops, as part of Quarterly reporting, national and international networking activities

Activity

Time would be scheduled during each Study Visit for a Writing Day which would be given over entirely to responding to the aims, tasks and outcomes of the Study Visit. In a large group the Polish delegation could work as individuals or in twos. The final report to be put together on a laptop

planning

Tuesday, August 1, 2000

John C Francis

EU Task Force Leader SMART 02

Appendix D

STUDY VISIT PROGRAMME OF POLISH MOTHER TONGUE GROUP

Prepared by John Francis

SMART 02:POLISH SUBJECT GROUP VISIT - 14 TO 23 APRIL 1998

Tuesday 14 April 1998

Time	Activity	Objective
am	Depart Warsaw 0800. Dep. Heathrow 1030Met by John Francis who will travel with group by coach to Paddington station, London, to dep11.45 to Birmingham University arrive 13.25. Transfer to Conference	Arrive in UK
pm	13.00 Register at NATE Conference, Birmingham 18.15 Evening Reception for Overseas guests	Arrive at Conference
Buy your own Lunch. Dinner provided		

Wednesday 15 to Thursday 16 1998

Time	Activity	Objective
am and pm	NATE Conference sessions and exhibition Attending seminars Engaging in discussion Setting up short, special workshops Inspecting and ordering appropriate educational, curricular and technical material (A budget of £200 is available. Use asset sheet to record orders, AEB to purchase and deliver later)) (Associated Examining Board staff representative is Rob Gillingham) with Denise Johnston	To enhance professional skills and understanding with respect to overall aims of the SMART programme. To initiate and develop a network of colleagues. To engage in dialogue on current issues in own subject. To initiate and develop a network of colleagues. To evaluate subject and methodological developments in own subject in UK and Polish context.
Lunch and dinner provided		

Friday 17 April 1998

Time	Activity	Objective
am	Conference ends with Lunch . Dep with Gareth Lewis to catch 14.45 to London	
pm	Depart Birmingham from NATE Conference to Arosfa Hotel. Staying 17 April to 22 April 1998 - Arosfa Hotel, 83 Gower St. London, WC1E 6HJ Tel 0171 636 2115	Arrive at Hotel
Lunch provided. Buy your own Dinner		

Saturday 18 April and Sunday 19 April 1998

Time	Activity	Objective
am and pm	Visits to Science, Geological and Natural History Museums in Exhibition Road, and Dillons bookshop (where an account for £400 is available) with Denise Johnston	To gain understanding of some aspects of UK life and culture. To place in context observations, discussions and materials.
Buy your own Lunch and Dinner on both days		

Monday 20 April 1998

Time	Activity	Objective
am and pm	09.30 to 10.30. Visit to House of Commons with Denise Johnston. 1140 leave Waterloo arrive Guildford 12.15. Taxis to Wates House Associated Examining Board 12.30 to 17.00 Presentations by AEB Staff: Orientation tour. Depart Guildford 17.33	To gain understanding of some aspects of UK life and culture. To observe the activities, processes and dynamics. To establish contact with colleagues within relevant departments and set up a procedure for exchange of ideas and materials.
Lunch provided Buy your own Dinner		

SMART 02:POLISH SUBJECT GROUP VISIT - 14 TO 23 APRIL 1998

Tuesday 21 April 1998

Time	Activity	Objective
am/ pm	School visit to Brooklands College, Surrey, with Denise Johnston Presentation by Polish delegates to UK colleagues on the purpose of the visit, including some information about the background to Polish education and political issues. Discussions with senior management team, governors and students. Participation in lessons. Orientation tour of school.	To initiate and develop a dialogue between Polish educationalists and UK colleagues in schools through visits to schools in the UK. To gain insight into the issues facing UK teachers and managers and how these are dealt with against the UK cultural, political and economic environment. To observe and interact with students in a teaching situation. To understand how the National Curriculum is interpreted and delivered in the UK context.
Lunch is provided. Buy your own dinner.		

Wednesday 22 April 1998

Time	Activity	Objective
am/ pm	1140 leave Waterloo arrive Guildford 12.15. Taxis to Wates House Visit to AEB. discussions, inspection and selection of relevant examination material Discussions with Chief Examiner	To observe the activities, processes and dynamics. To gain an understanding of the role, objectives, management, function, structure and culture of a large examining board. To establish contact with colleagues within relevant departments and set up a procedure for exchange of ideas and materials.
Lunch is provided. Buy your own dinner.		

Thursday 23 April 1998

Time	Activity	Objective
am	0830 leave Arosfa Hotel. 0950 Check in at Heathrow Terminal 2. 10.50 Return flight to Poland	Return to Poland